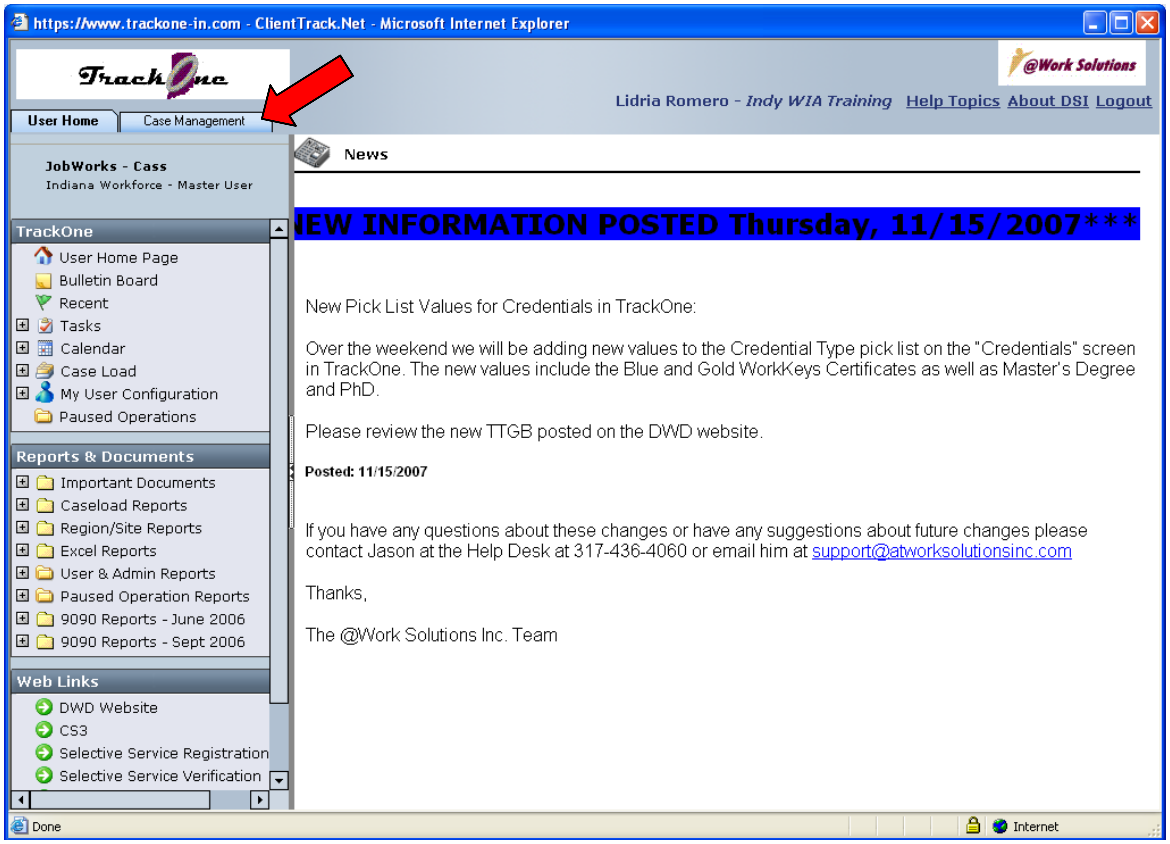
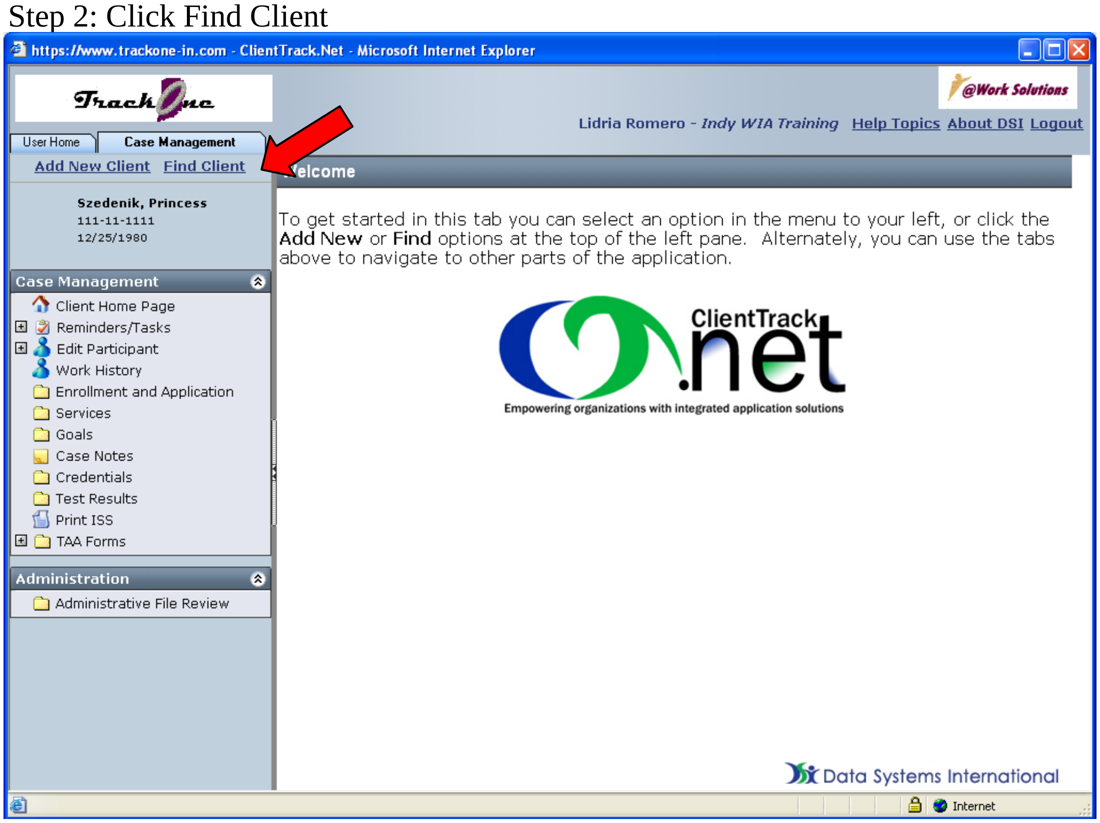
ADDENDUM 1A

A. Track One History Check

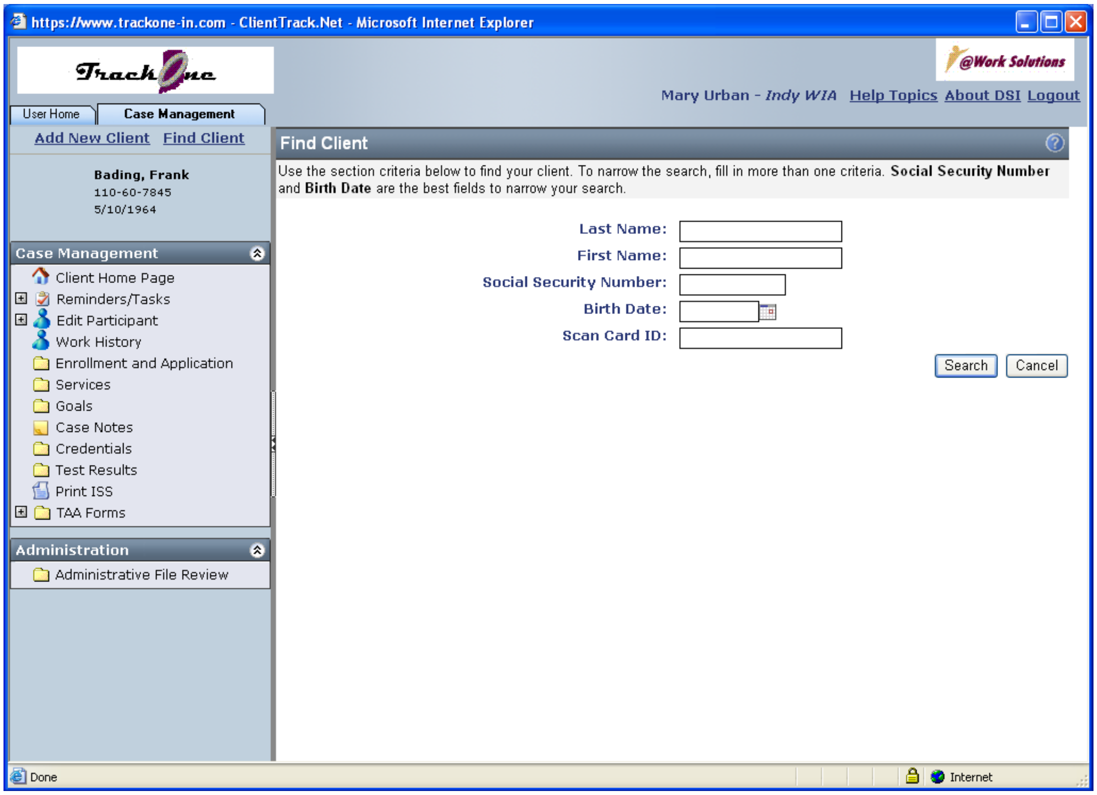
Step 1: Click Case Management



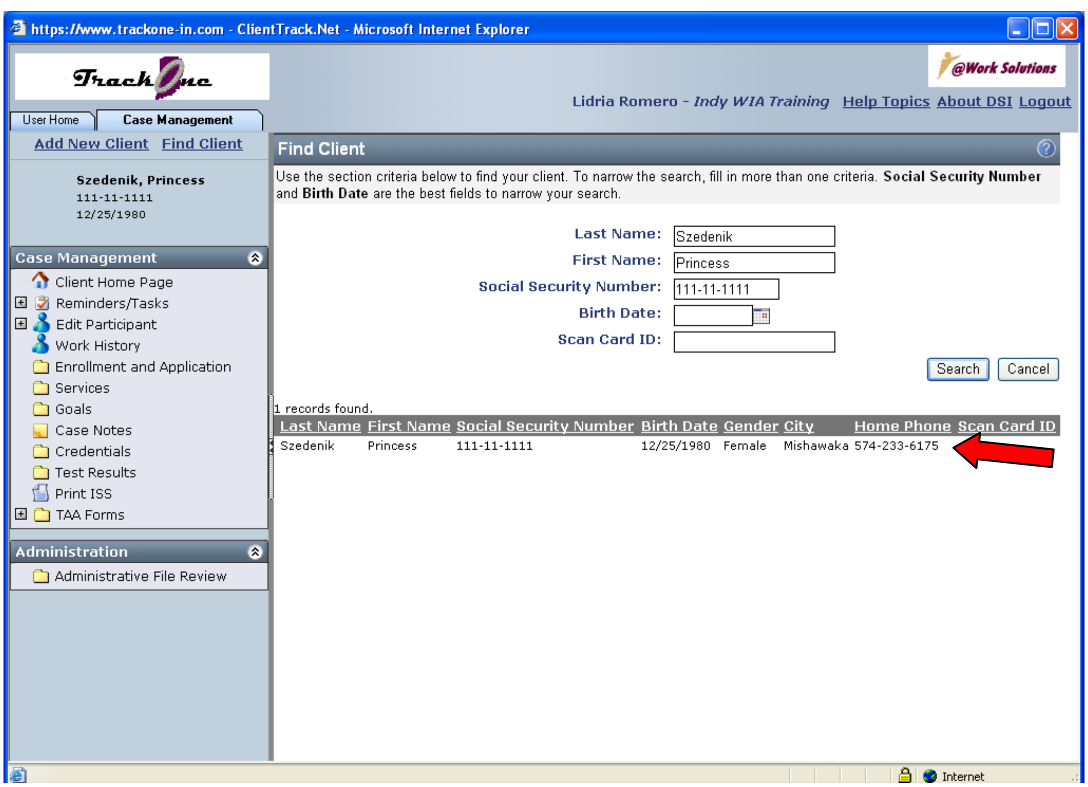
Step 2: Click Find Client



Step 3: In “Find Client” Screen, Enter Last Name, First Name and click search. (If not in system, you will need to add new client)

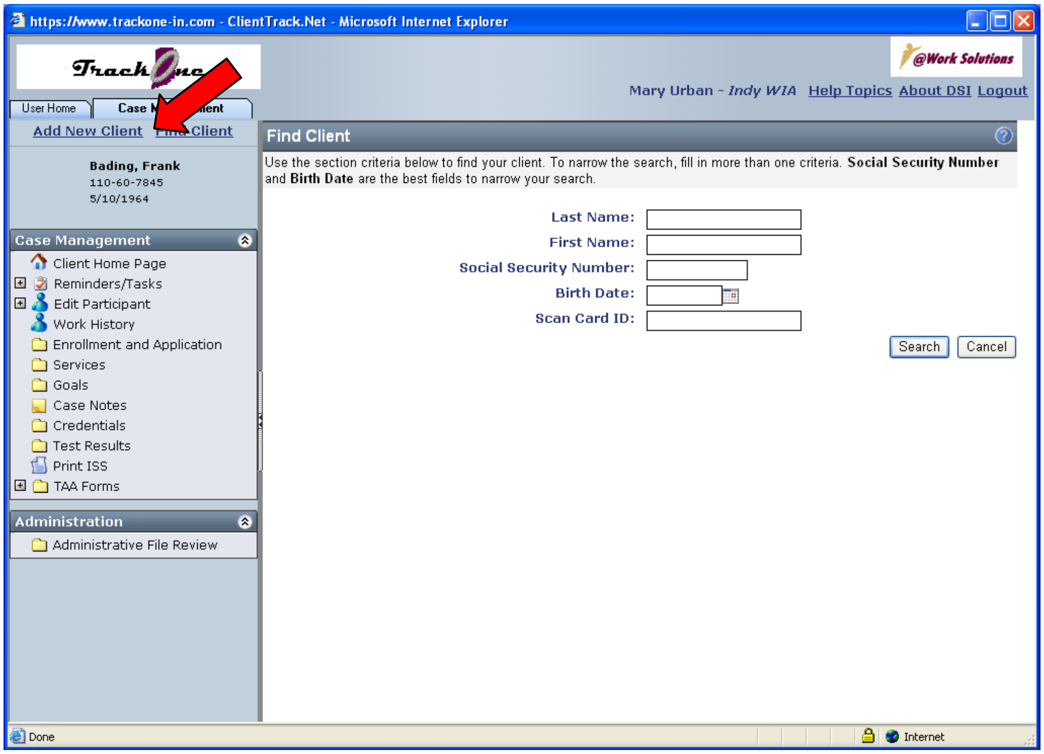


Step 4: Name will appear in the bottom portion of the screen is the customer is registered in TrackOne. Since several names may be listed, match the SS# with the name to verify the customer is already entered into TrackOne

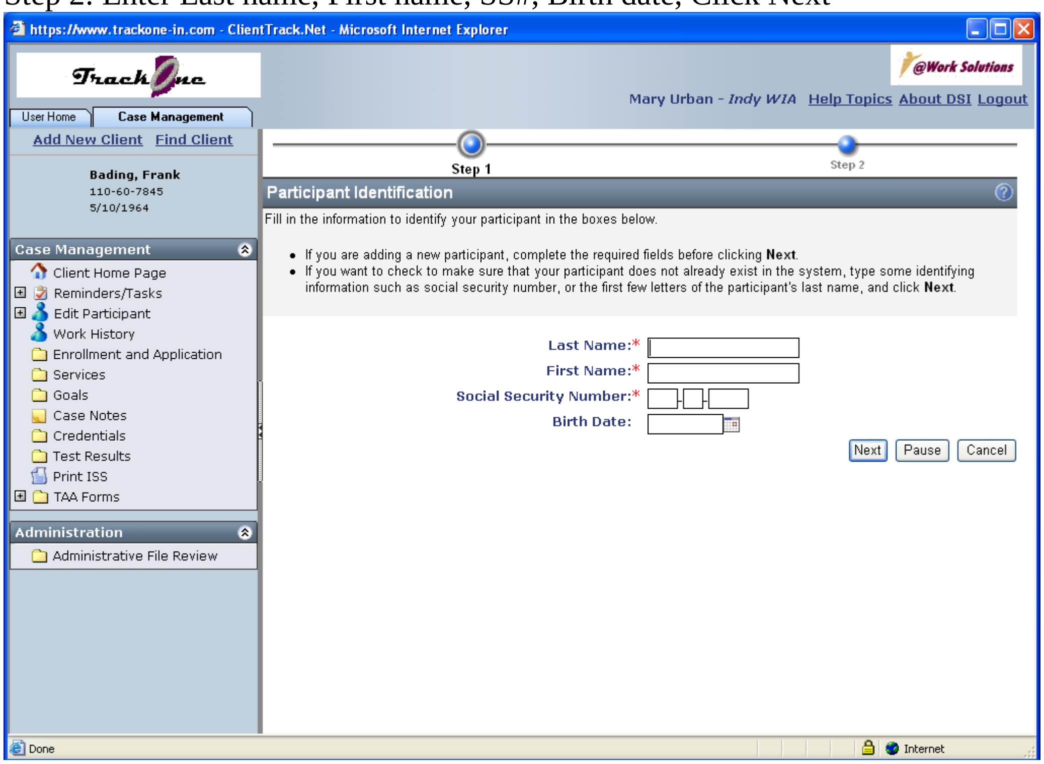


B. Add New Client into Track One

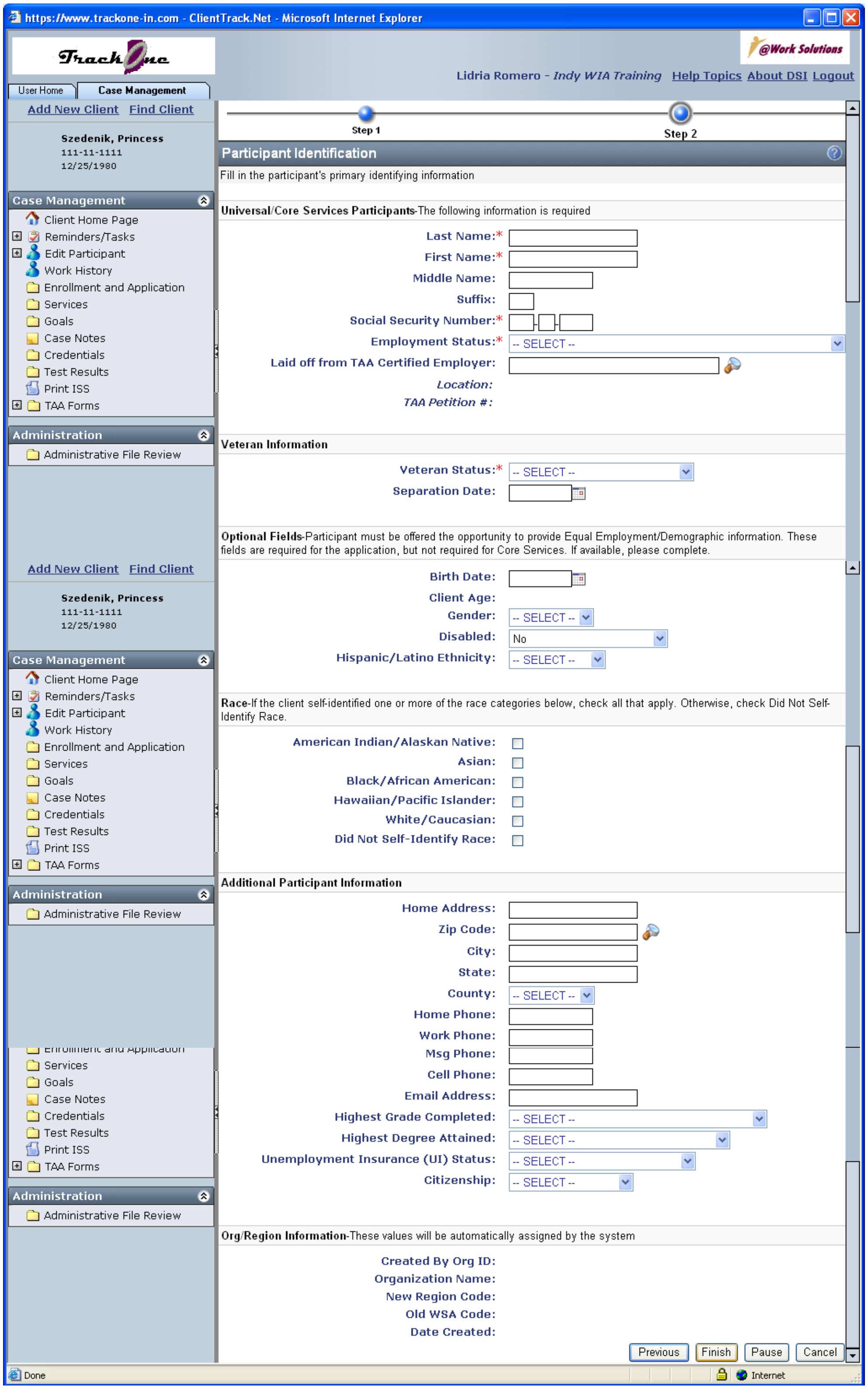
Step 1: Click add new client (This will take you to the participant identification screen)



Step 2: Enter Last name, First name, SS#, Birth date, Click Next

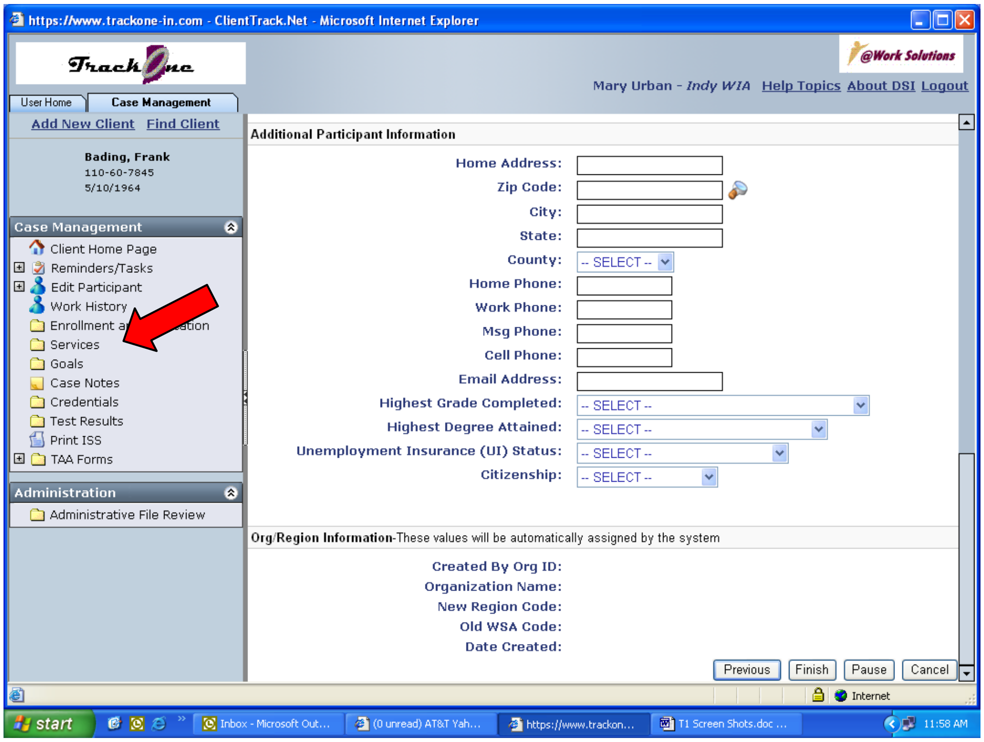


Step 3: 10 Demographics (Some data may already be entered) Continue with Employment Status, Veteran Status, Birth date, Gender, Disabled Yes/No, Hispanic/Latino Ethnicity, Race, Home Address, Zip Code, City, State, County, Home #, Cell# optional, email optional, Highest grade completed, Highest Degree attained, UI status, citizenship.

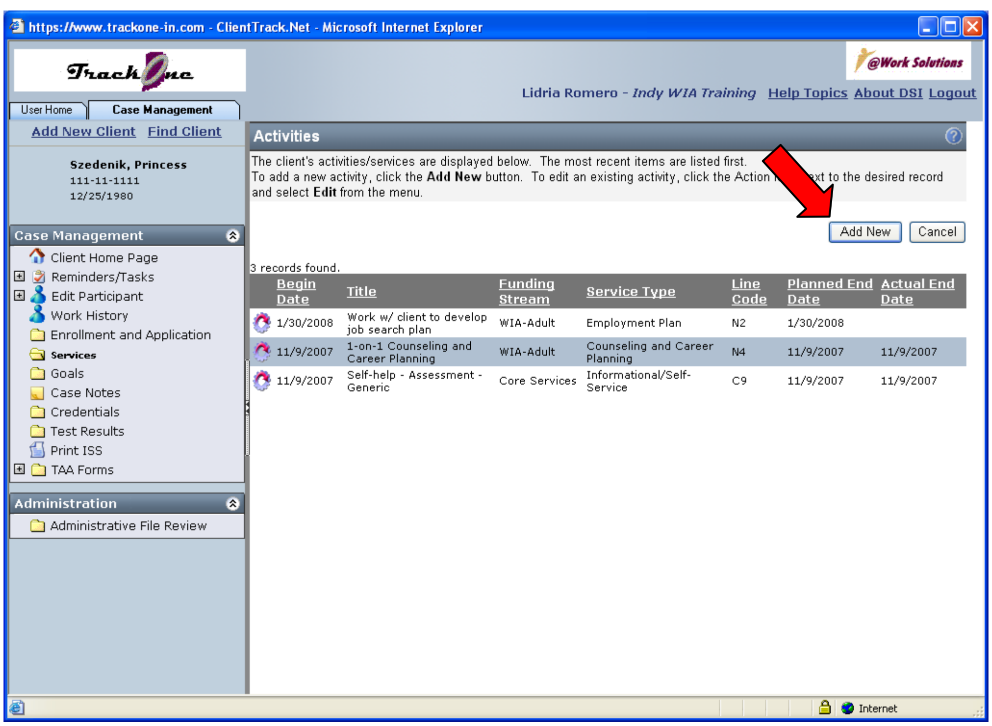


C. First Service Step

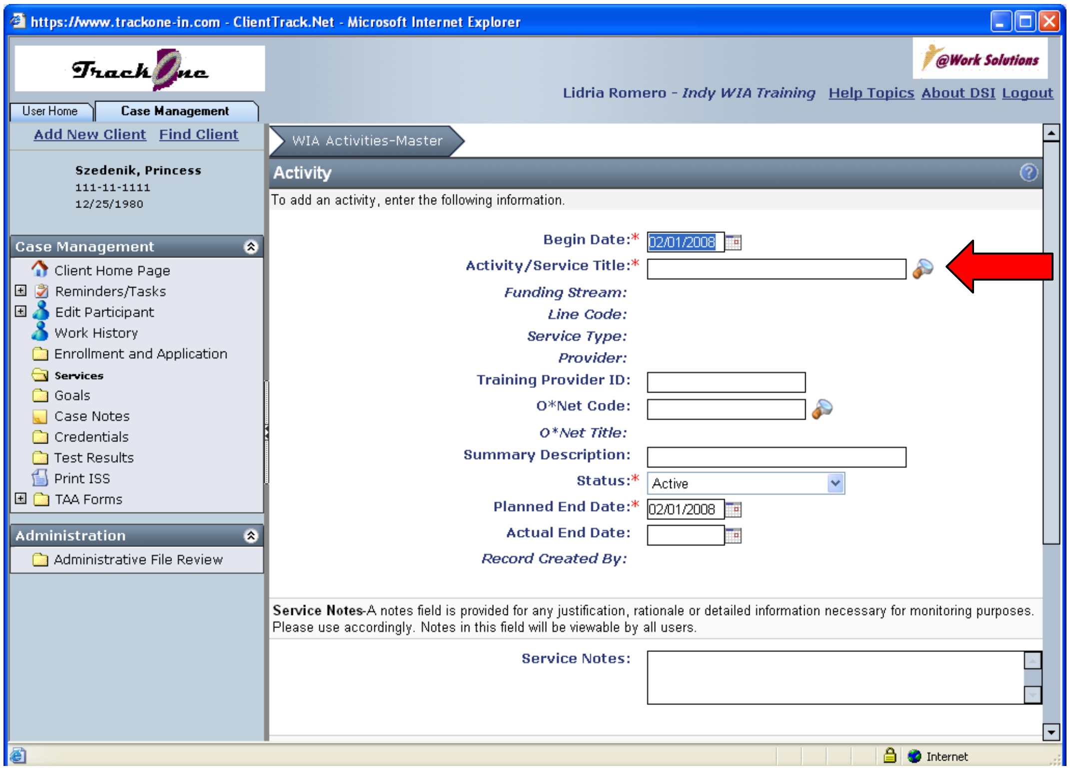
Step 1: After 10 demographics are entered, click "Services" on left side of screen. This will then take you to Activities Screen.



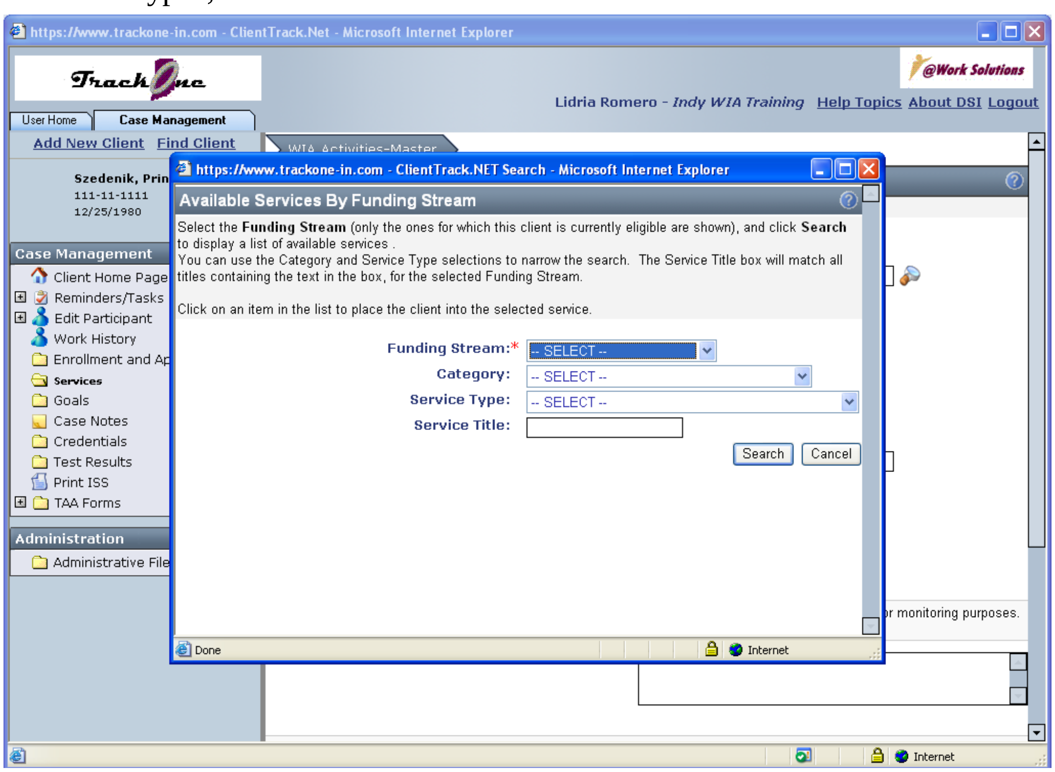
Step 2: To add a new service, click the add new button this will take you to the activity screen



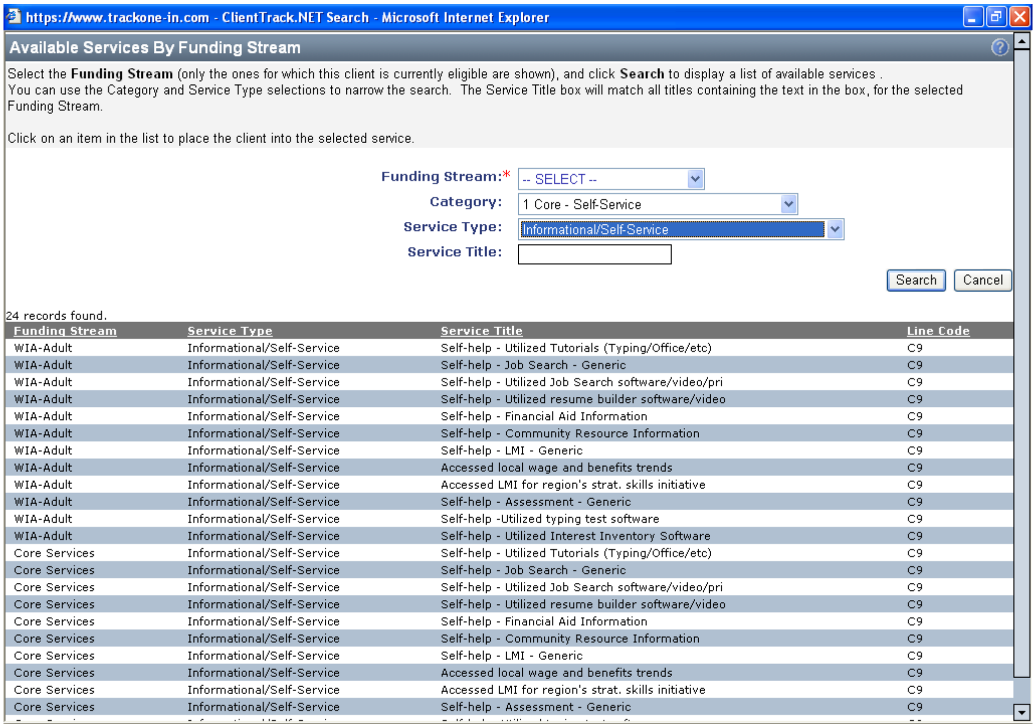
Step 3: At the "Add an Activity" page, click the magnifying glass next to Activity/Service Title, this will take you to available service by funding stream screen.



Step 4: In "Category" select "1 Core-Self Service", in the drop down menu under "Service Type", choose "Informational/Self-Service."

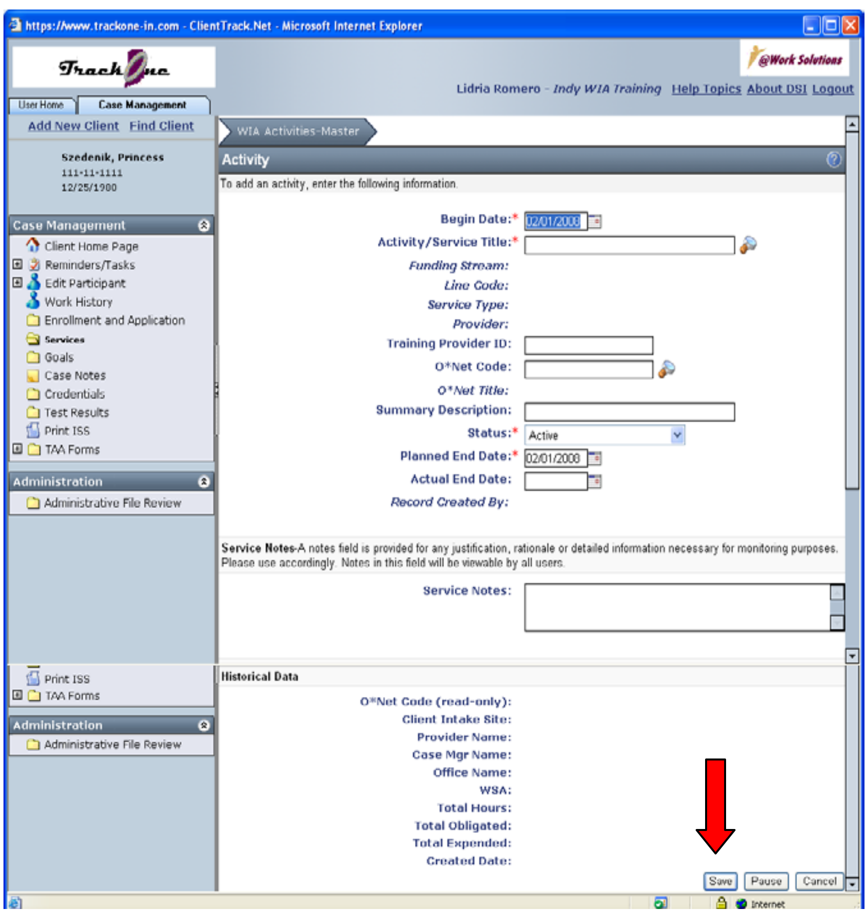


Step 5: Click “Search.” A page displaying “Available services by funding stream” should show. **Note:** There are various Core-Self Help C9’s that may be selected (select most appropriate).



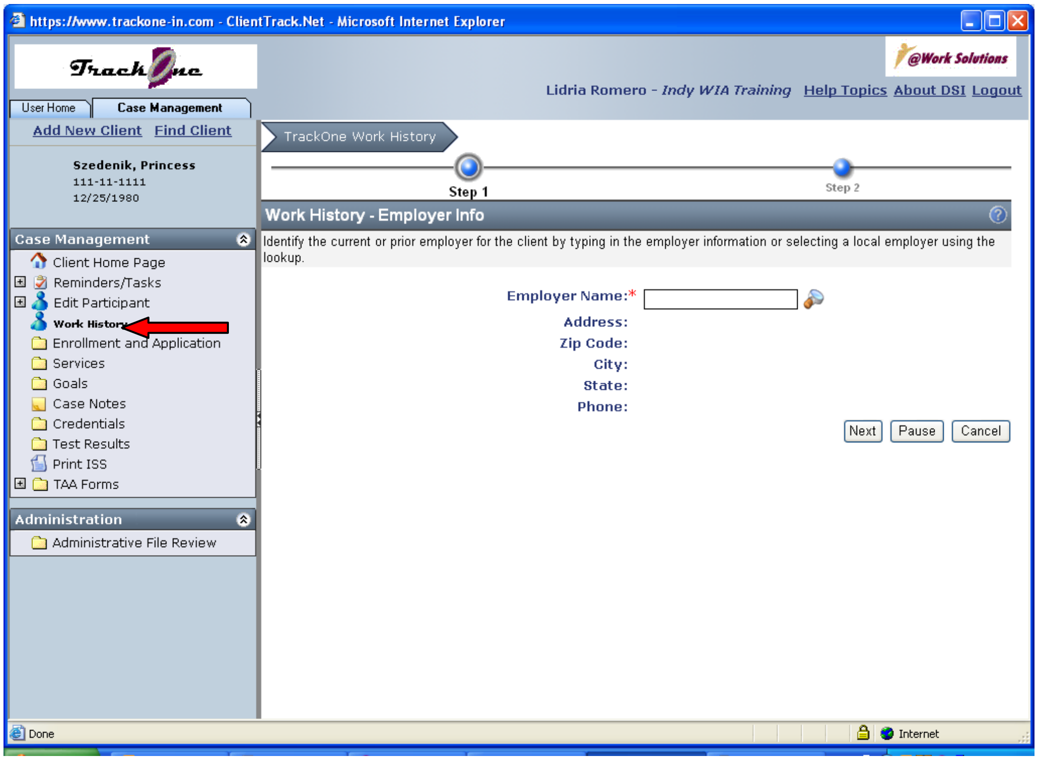
Funding Stream	Service Type	Service Title	Line Code
WIA-Adult	Informational/Self-Service	Self-help - Utilized Tutorials (Typing/Office/etc)	C9
WIA-Adult	Informational/Self-Service	Self-help - Job Search - Generic	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized Job Search software/video/pri	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized resume builder software/video	C9
WIA-Adult	Informational/Self-Service	Self-help - Financial Aid Information	C9
WIA-Adult	Informational/Self-Service	Self-help - Community Resource Information	C9
WIA-Adult	Informational/Self-Service	Self-help - LMI - Generic	C9
WIA-Adult	Informational/Self-Service	Accessed local wage and benefits trends	C9
WIA-Adult	Informational/Self-Service	Accessed LMI for region's strat. skills initiative	C9
WIA-Adult	Informational/Self-Service	Self-help - Assessment - Generic	C9
WIA-Adult	Informational/Self-Service	Self-help -Utilized typing test software	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized Interest Inventory Software	C9
Core Services	Informational/Self-Service	Self-help - Utilized Tutorials (Typing/Office/etc)	C9
Core Services	Informational/Self-Service	Self-help - Job Search - Generic	C9
Core Services	Informational/Self-Service	Self-help - Utilized Job Search software/video/pri	C9
Core Services	Informational/Self-Service	Self-help - Utilized resume builder software/video	C9
Core Services	Informational/Self-Service	Self-help - Financial Aid Information	C9
Core Services	Informational/Self-Service	Self-help - Community Resource Information	C9
Core Services	Informational/Self-Service	Self-help - LMI - Generic	C9
Core Services	Informational/Self-Service	Accessed local wage and benefits trends	C9
Core Services	Informational/Self-Service	Accessed LMI for region's strat. skills initiative	C9
Core Services	Informational/Self-Service	Self-help - Assessment - Generic	C9

Step 6: After selecting most appropriate C9 service, TrackOne will go back to the “Activity” page. Some entries may be automatically filled in, but you must complete all other asterisked items and then click “Save” button on bottom of page.

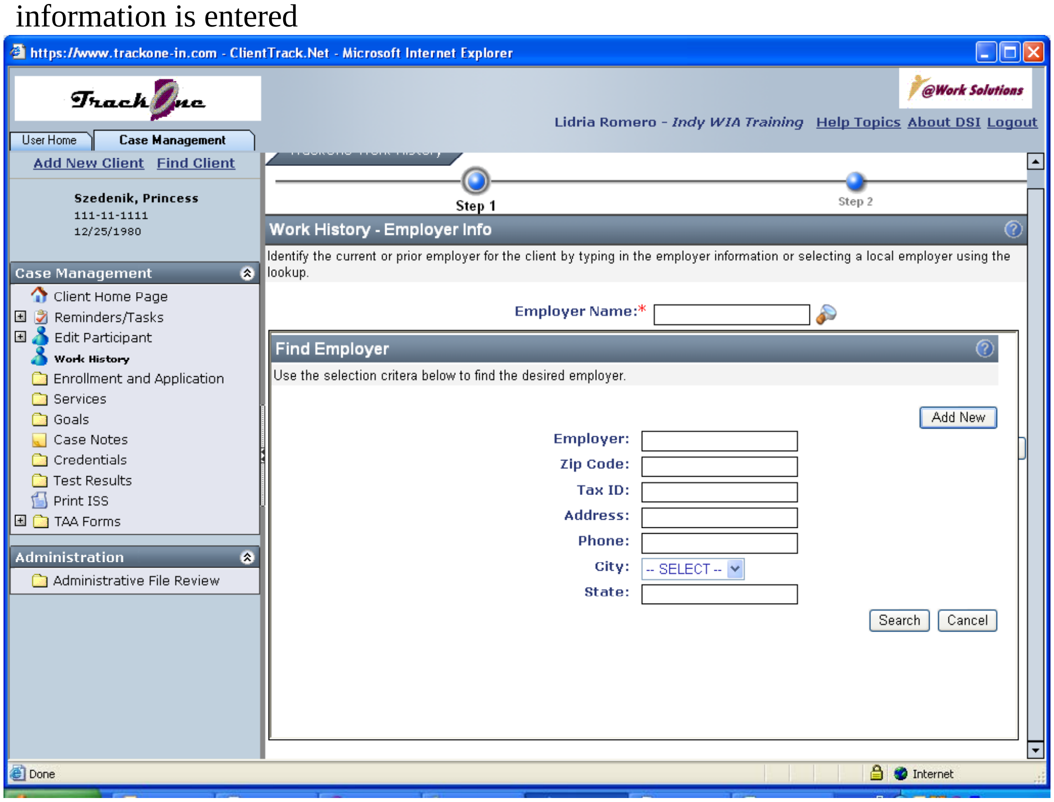


D. Work History

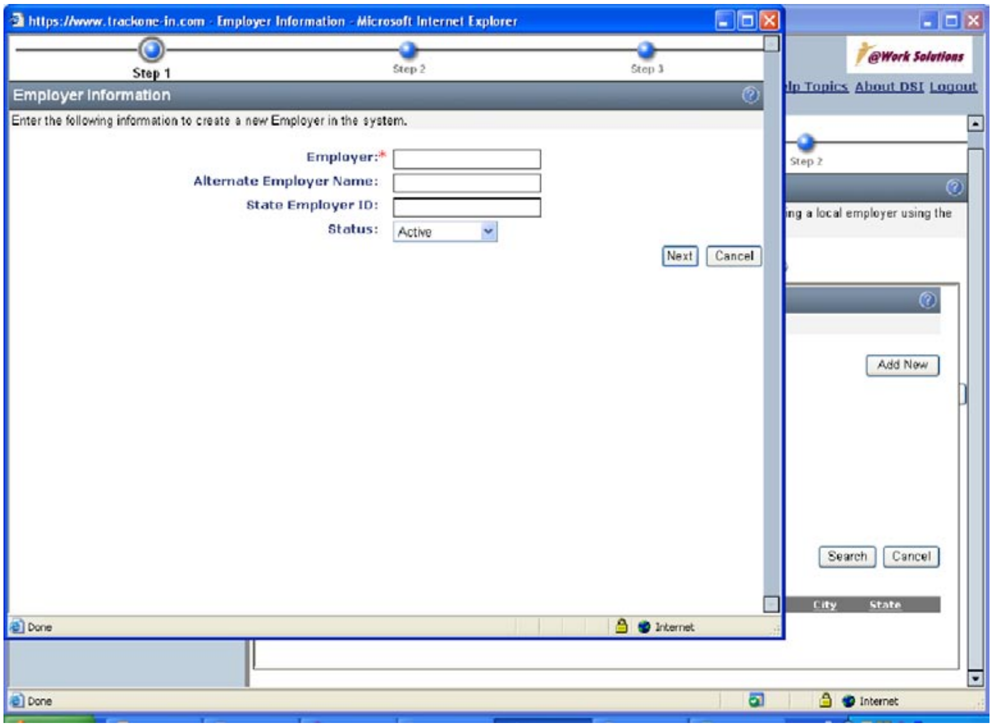
Step 1: Click on “Work history” to enter Work History. The page below should display. To enter work history, begin by either typing in the employer name (if you know it already exists in TrackOne) and click “next” or hit the magnifying glass next to “Employer Name” to refine search or enter new employer name.



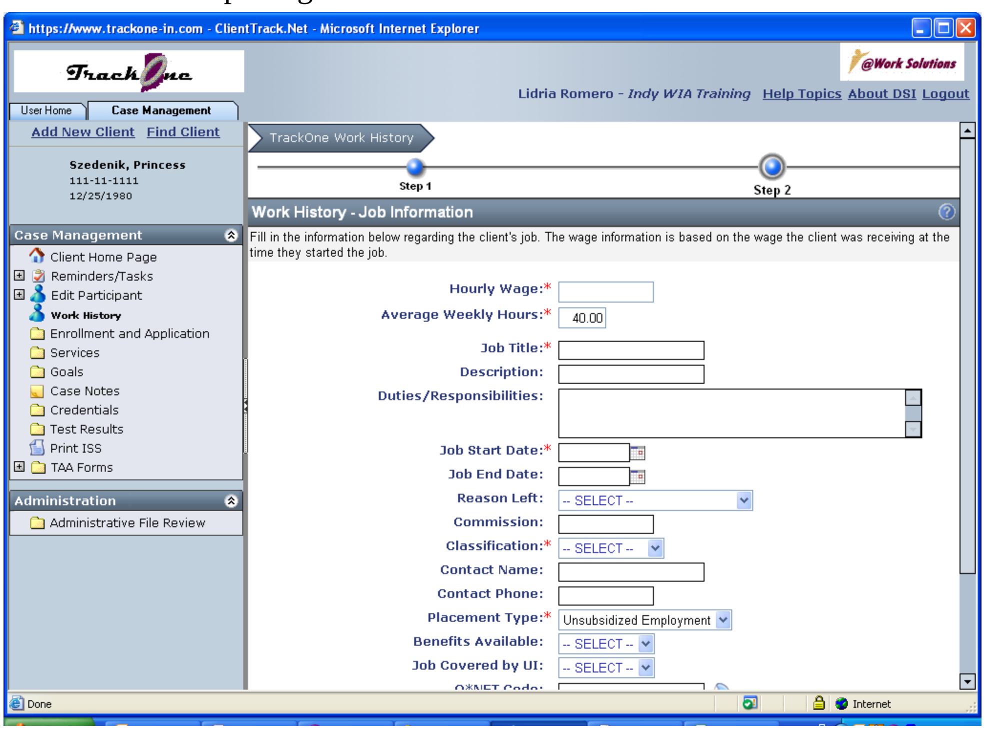
Step 2: If Magnifying glass was clicked, the page below displays. Enter in Employer information to find or, if employer if new, then click the “Add New” button after information is entered



<u>Step3:</u> If "Add New" was clicked, TrackOne will begin a 3-Step process to enter in the employer's information. Click "Finish" when information is completed.



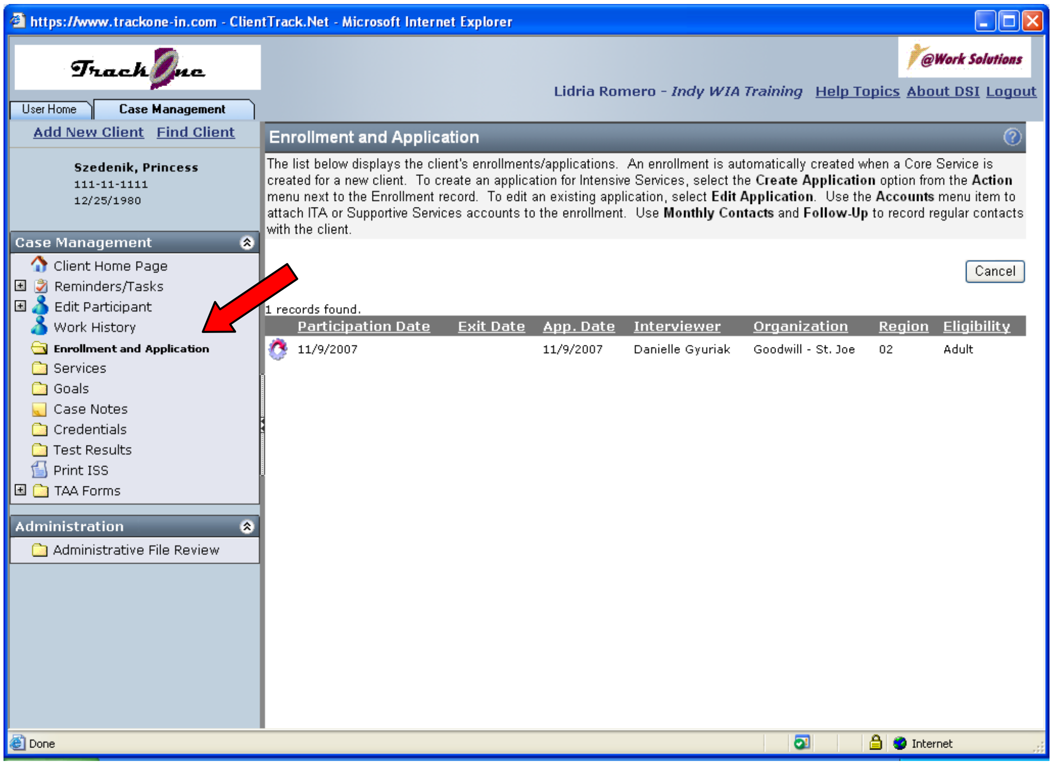
<u>Step 4:</u> After Employer information is entered, or if employer information was found in the initial search, the "Work History – Job Information" page displays. Click "Finish" when done completing fields.



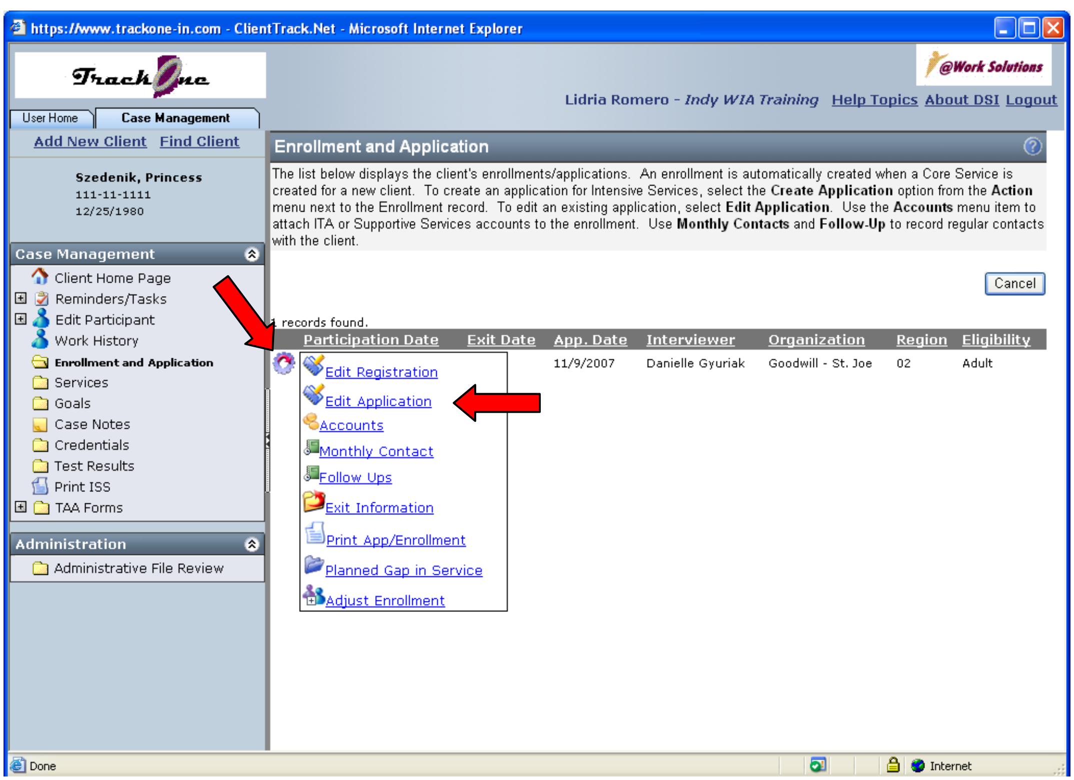
Step 5: After clicking “Finish”, TrackOne will revert back to “Client Work History” page where you can enter more Work History information or continue with procedure.

E. Track One Application

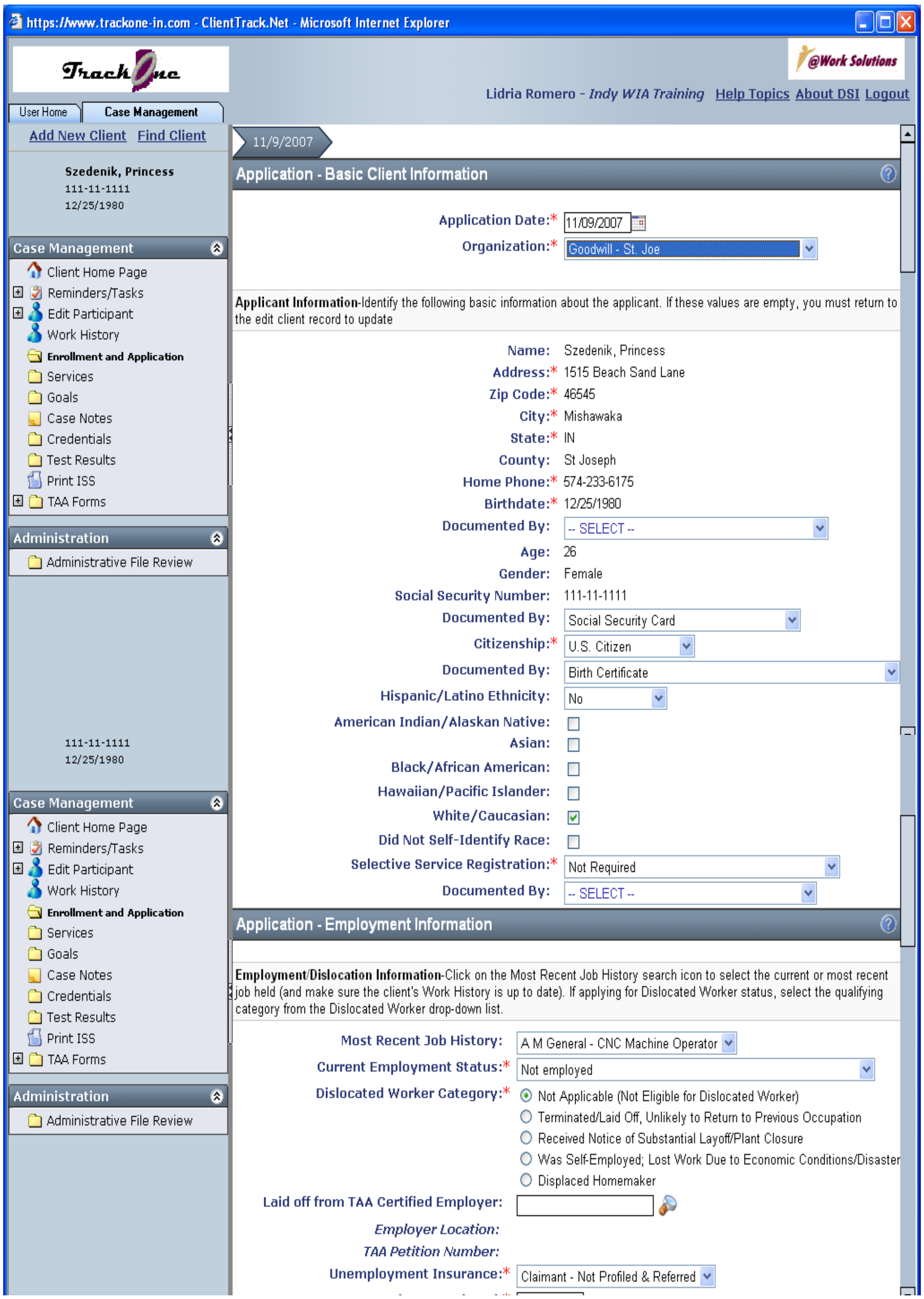
Step 1: Click enrollment and application folder on left, TrackOne will display the screen below



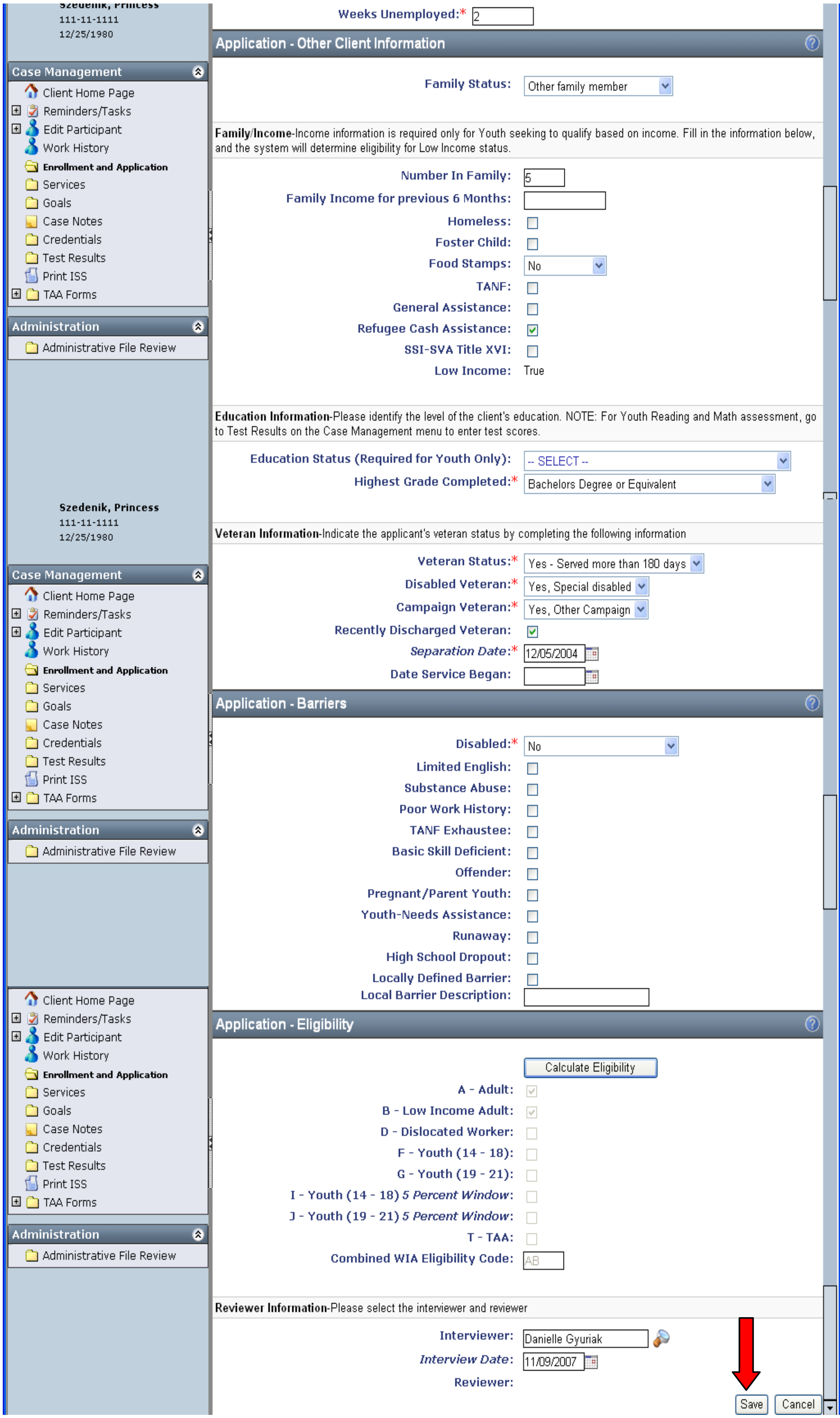
Step 2: Click on gear next to participation date, a drop-down menu appears. Click on “Edit Application”. This will take you to “Application-Basic Client Information Screen.”



Step 3: In “Application-Basic Client Information Screen”, all information must be entered. You will need to click the “Calculate Eligibility” button in order for TrackOne to calculate it. The screen will refresh to show eligibility. Click “Save” at the bottom of the screen.



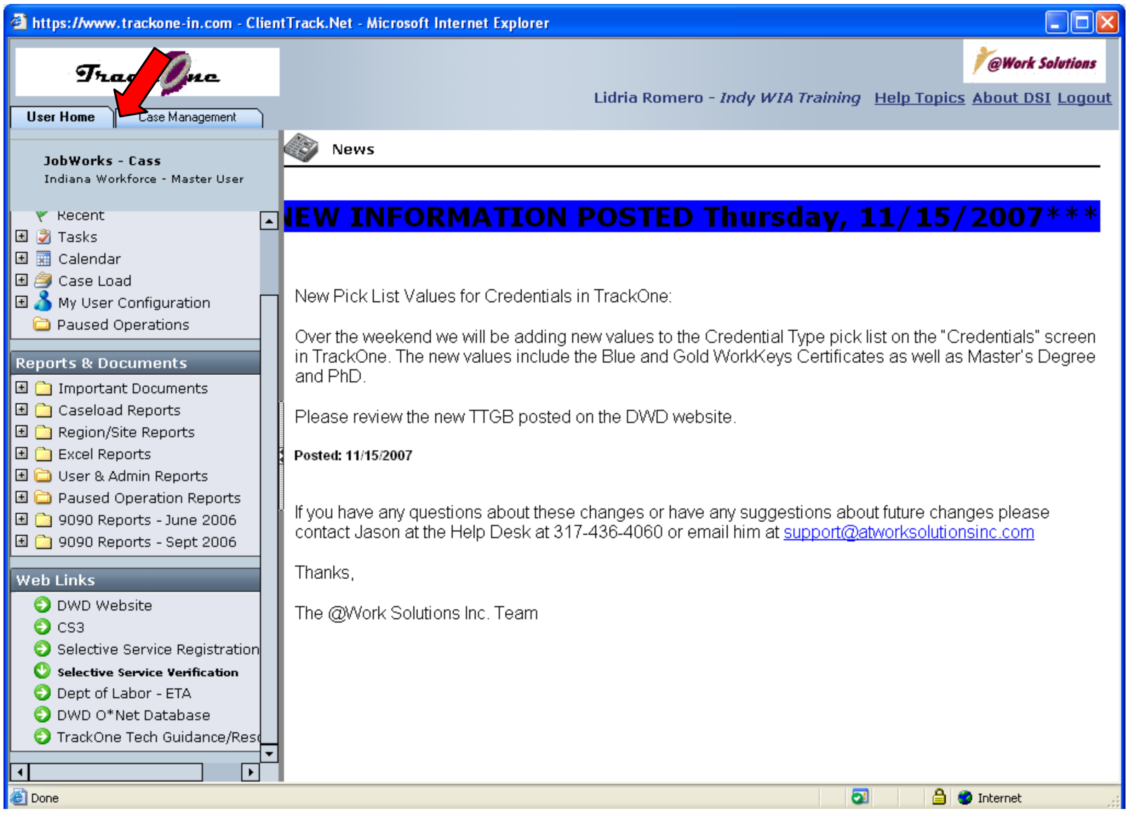
Screens continue on next page:


Szedenik, Princess
111-11-1111
12/25/1980
Case Management
Client Home Page
Reminders/Tasks
Edit Participant
Work History
Enrollment and Application
Services
Goals
Case Notes
Credentials
Test Results
Print ISS
TAA Forms
Administration
Administrative File Review
Weeks Unemployed:* 2
Application - Other Client Information
Family Status: Other family member
Family/Income-Income information is required only for Youth seeking to qualify based on income. Fill in the information below, and the system will determine eligibility for Low Income status.
Number In Family: 5
Family Income for previous 6 Months:
Homeless:
Foster Child:
Food Stamps: No
TANF:
General Assistance:
Refugee Cash Assistance:
SSI-SVA Title XVI:
Low Income: True
Education Information-Please identify the level of the client's education. NOTE: For Youth Reading and Math assessment, go to Test Results on the Case Management menu to enter test scores.
Education Status (Required for Youth Only): -- SELECT --
Highest Grade Completed:* Bachelors Degree or Equivalent
Veteran Information-Indicate the applicant's veteran status by completing the following information
Veteran Status:* Yes - Served more than 180 days
Disabled Veteran:* Yes, Special disabled
Campaign Veteran:* Yes, Other Campaign
Recently Discharged Veteran:
Separation Date:* 12/05/2004
Date Service Began:
Application - Barriers
Disabled:* No
Limited English:
Substance Abuse:
Poor Work History:
TANF Exhaustee:
Basic Skill Deficient:
Offender:
Pregnant/Parent Youth:
Youth-Needs Assistance:
Runaway:
High School Dropout:
Locally Defined Barrier:
Local Barrier Description:
Application - Eligibility
Calculate Eligibility
A - Adult:
B - Low Income Adult:
D - Dislocated Worker:
F - Youth (14 - 18):
G - Youth (19 - 21):
I - Youth (14 - 18) 5 Percent Window:
J - Youth (19 - 21) 5 Percent Window:
T - TAA:
Combined WIA Eligibility Code: AB
Reviewer Information-Please select the interviewer and reviewer
Interviewer: Danielle Gyuriak
Interview Date: 11/09/2007
Reviewer:
Save
Cancel

Selective Service Screen

The Selective Service website can be accessed directly from TrackOne

Step 1: In Track One click on user home tab.

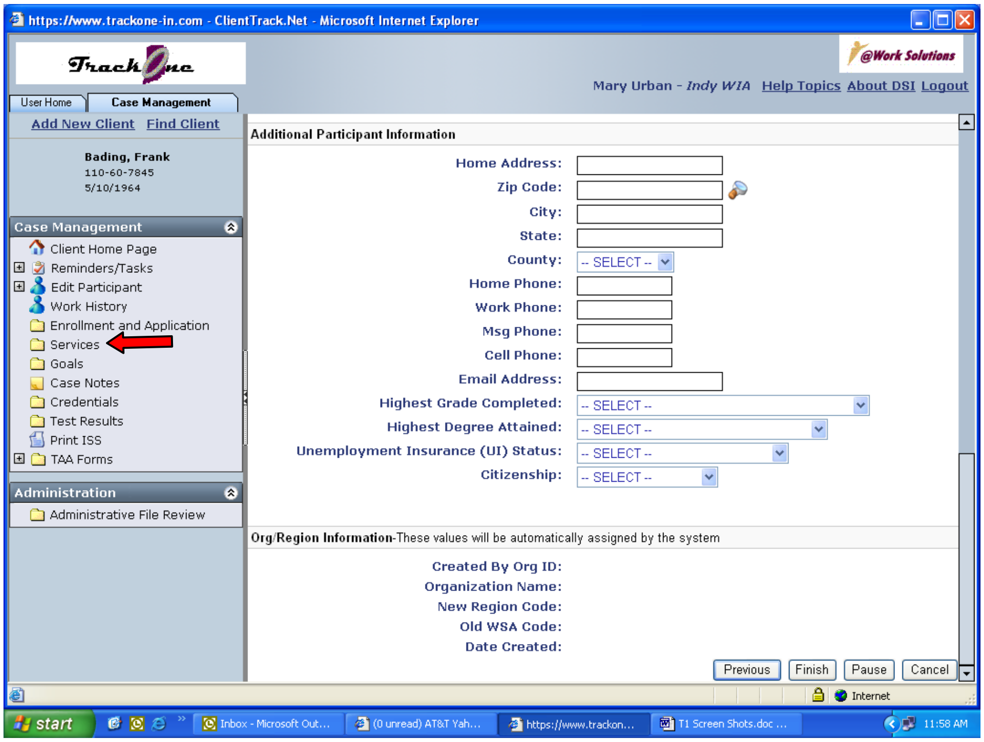


Step 2: On the left side of the screen scroll down and click on Selective Service Registration. The screen below should show (if website is unavailable, registration can be completed by calling (847) 688-6888.

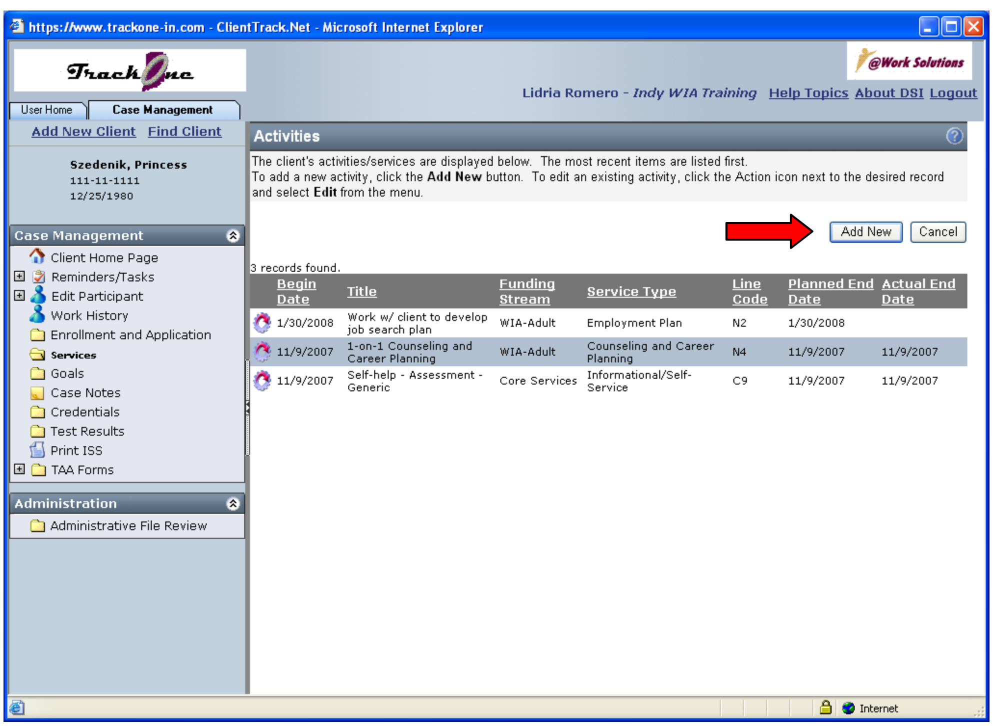
Step 3: You can then enter the customers SS# to verify if he is registered.

F. Recording the Results of the Initial Skills Indicator in TrackOne

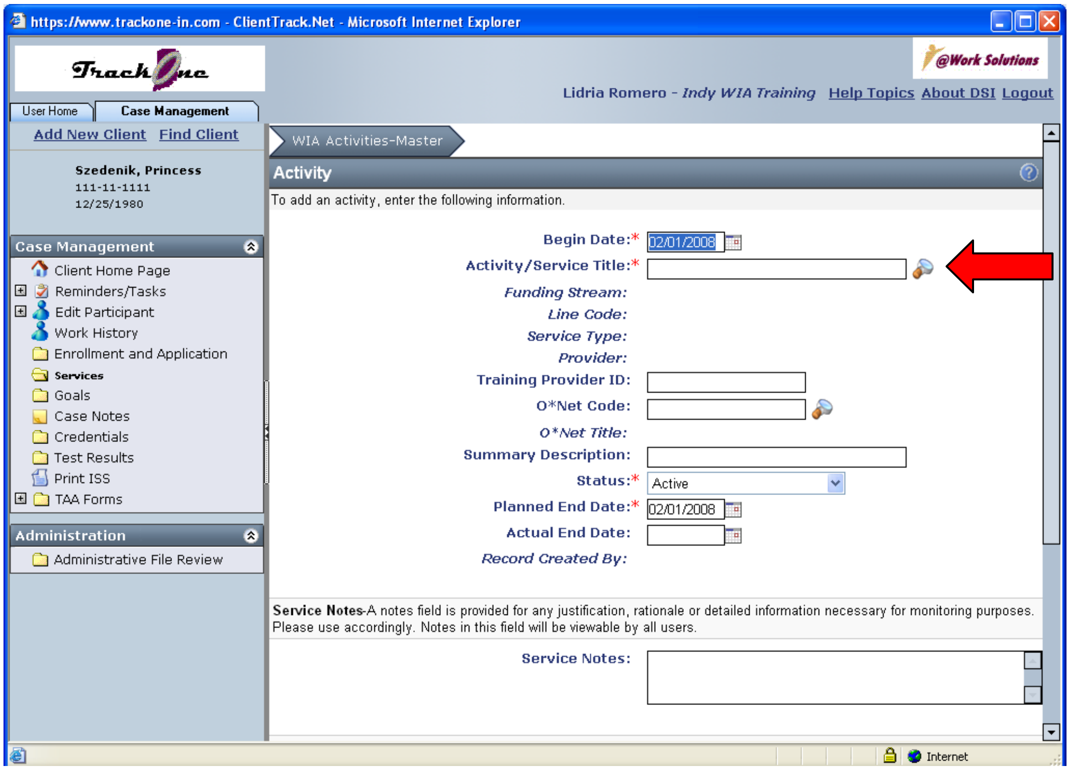
Step 1: Click "Services" on left side of screen. This will take you to Activities Screen.



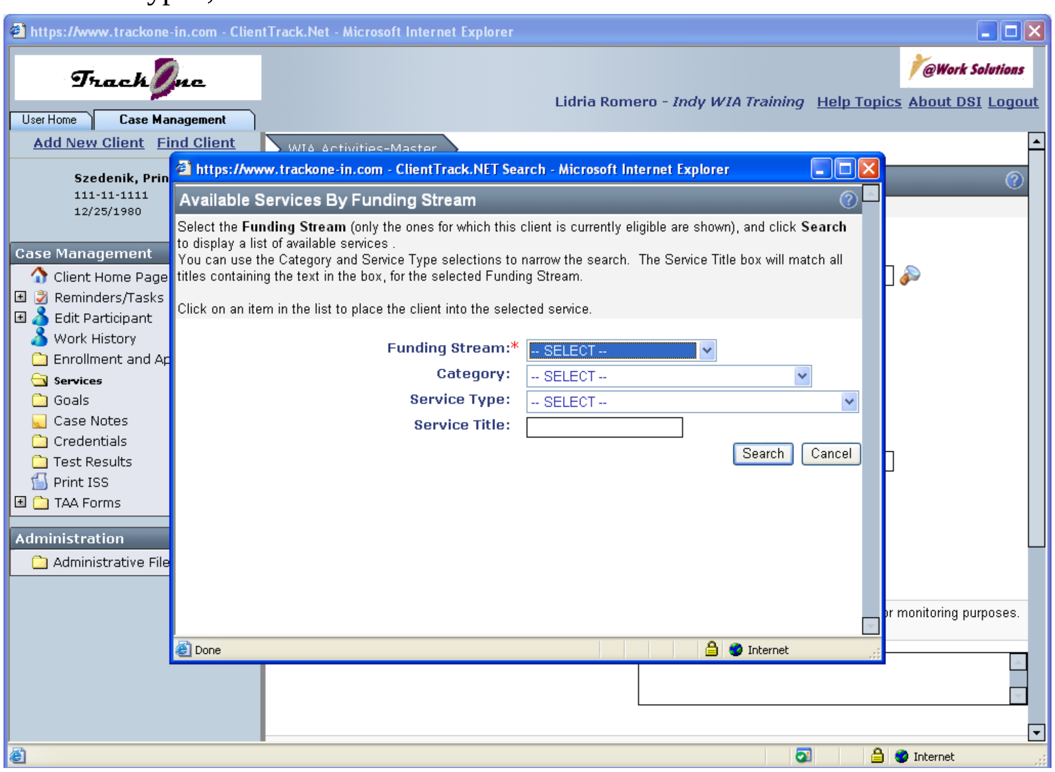
Step 2: To add the Initial Skills Indicator results, click the "Add New" button. This will take you to the activity screen



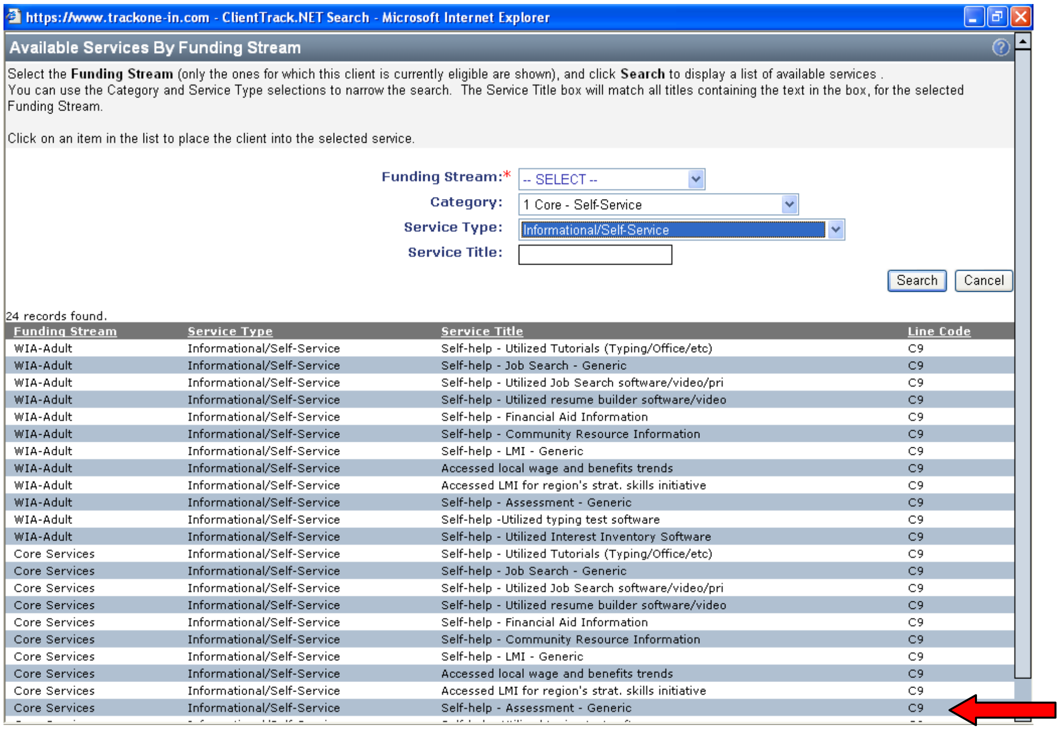
Step 3: At the “Add an Activity” page, click the magnifying glass next to “Activity/Service Title”, this will take you to “Available Service by Funding Stream “ screen.



Step 4: In “Category” select “1 Core-Self Service”, in the drop down menu. Under “Service Type”, select “Informational/Self-Service.”

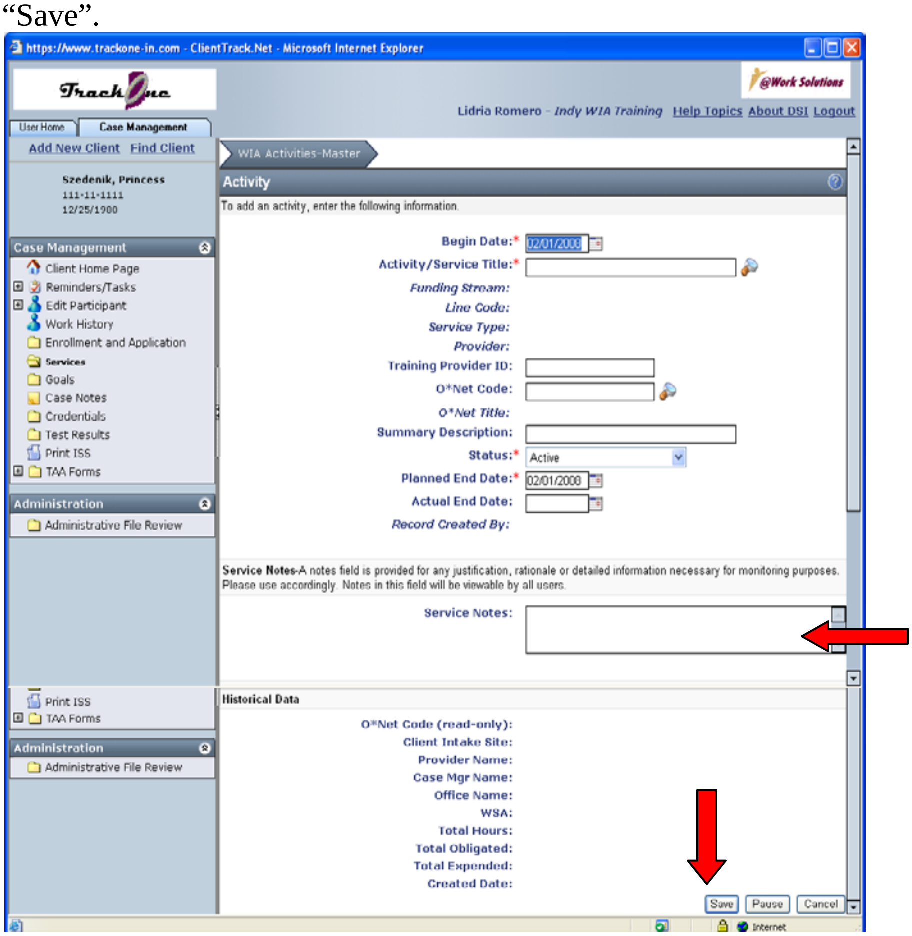


Step 5: Click “Search.” A page displaying “Available services by funding stream” should show. **Choose:** Informational/Self-Service – Self Help- Assessment- Generic”



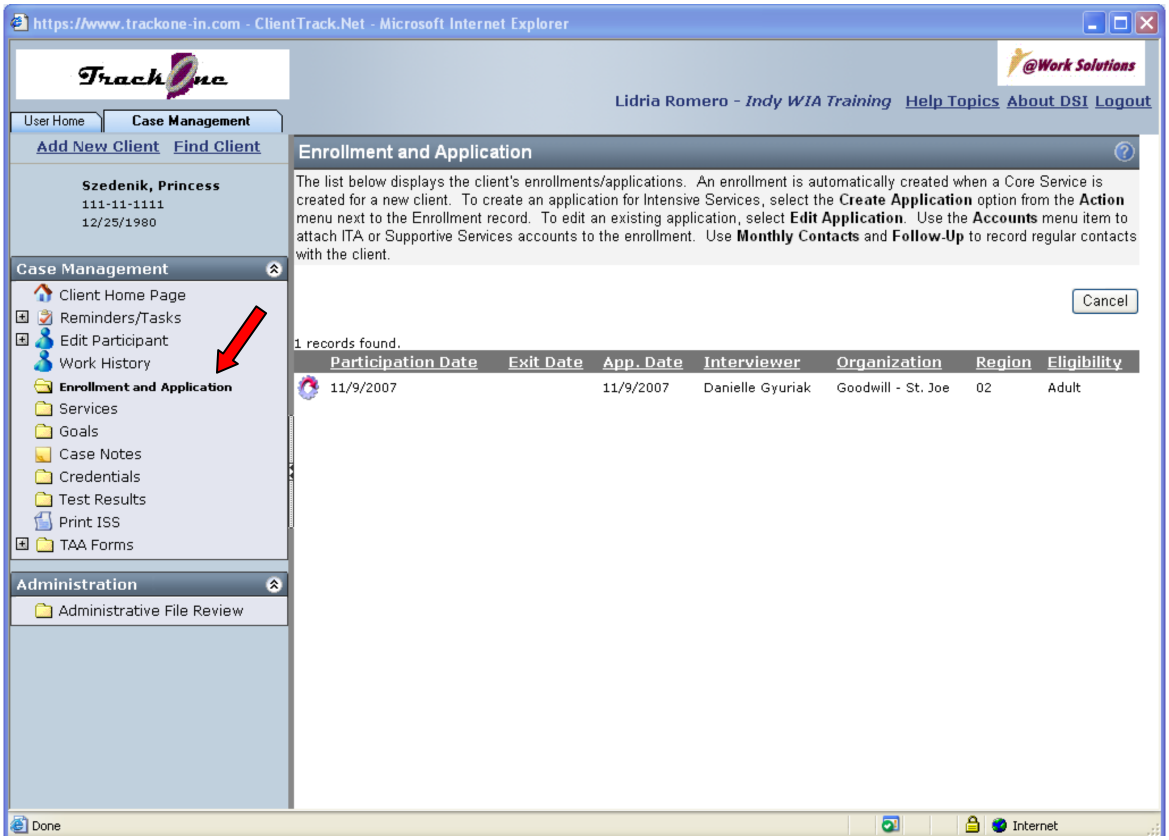
Funding Stream	Service Type	Service Title	Line Code
WIA-Adult	Informational/Self-Service	Self-help - Utilized Tutorials (Typing/Office/etc)	C9
WIA-Adult	Informational/Self-Service	Self-help - Job Search - Generic	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized Job Search software/video/pri	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized resume builder software/video	C9
WIA-Adult	Informational/Self-Service	Self-help - Financial Aid Information	C9
WIA-Adult	Informational/Self-Service	Self-help - Community Resource Information	C9
WIA-Adult	Informational/Self-Service	Self-help - LMI - Generic	C9
WIA-Adult	Informational/Self-Service	Accessed local wage and benefits trends	C9
WIA-Adult	Informational/Self-Service	Accessed LMI for region's strat. skills initiative	C9
WIA-Adult	Informational/Self-Service	Self-help - Assessment - Generic	C9
WIA-Adult	Informational/Self-Service	Self-help -Utilized typing test software	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized Interest Inventory Software	C9
Core Services	Informational/Self-Service	Self-help - Utilized Tutorials (Typing/Office/etc)	C9
Core Services	Informational/Self-Service	Self-help - Job Search - Generic	C9
Core Services	Informational/Self-Service	Self-help - Utilized Job Search software/video/pri	C9
Core Services	Informational/Self-Service	Self-help - Utilized resume builder software/video	C9
Core Services	Informational/Self-Service	Self-help - Financial Aid Information	C9
Core Services	Informational/Self-Service	Self-help - Community Resource Information	C9
Core Services	Informational/Self-Service	Self-help - LMI - Generic	C9
Core Services	Informational/Self-Service	Accessed local wage and benefits trends	C9
Core Services	Informational/Self-Service	Accessed LMI for region's strat. skills initiative	C9
Core Services	Informational/Self-Service	Self-help - Assessment - Generic	C9

Step 6: After selecting, TrackOne will revert to the “Activity” page. Some entries may be automatically filled in, but you must complete all other asterisked items. **The Initial Skills Indicator Test Result is to be placed in the “Service Notes” of this page.** Click “Save”.

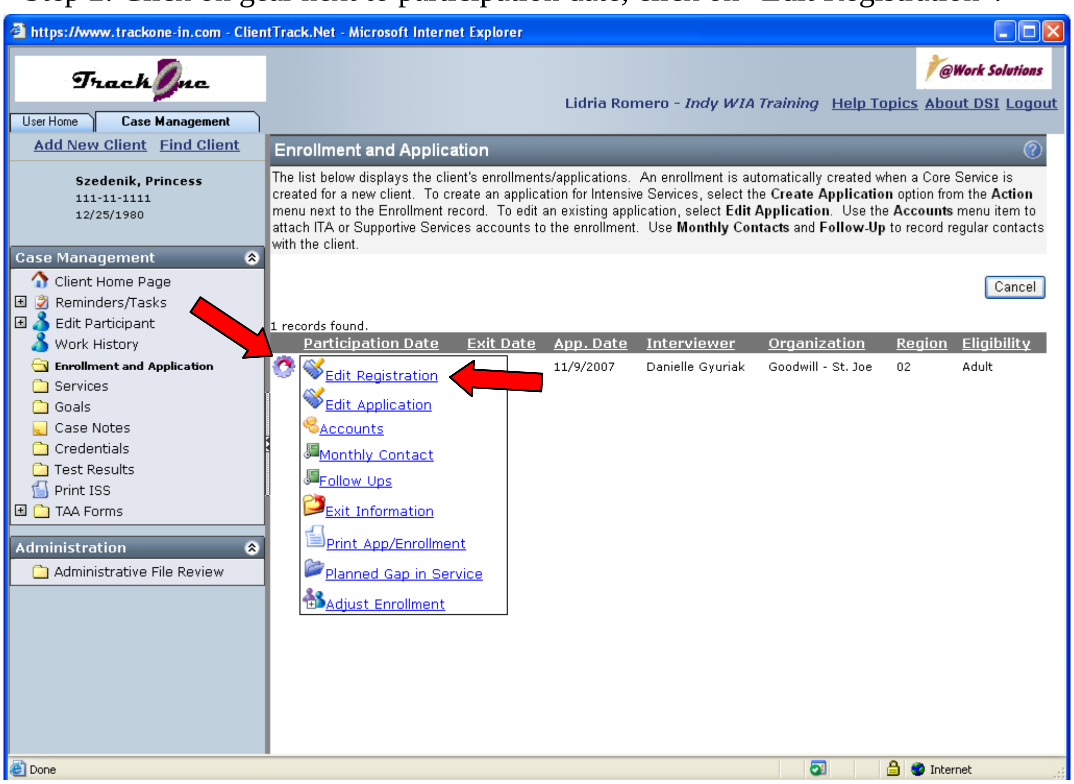


G. Program Eligibility

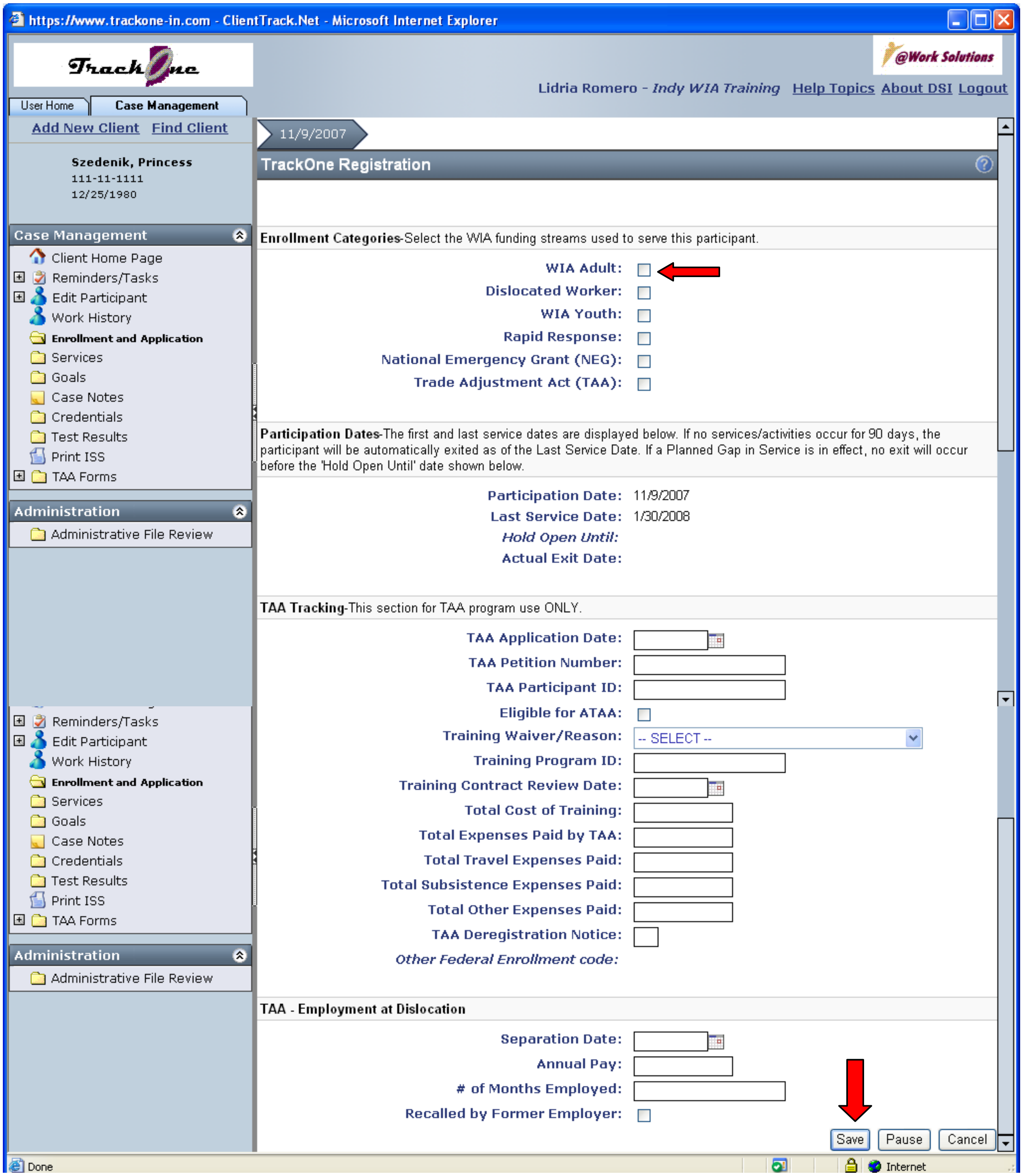
Step 1: Click "Enrollment and Application" folder on left



Step 2: Click on gear next to participation date, click on "Edit Registration".



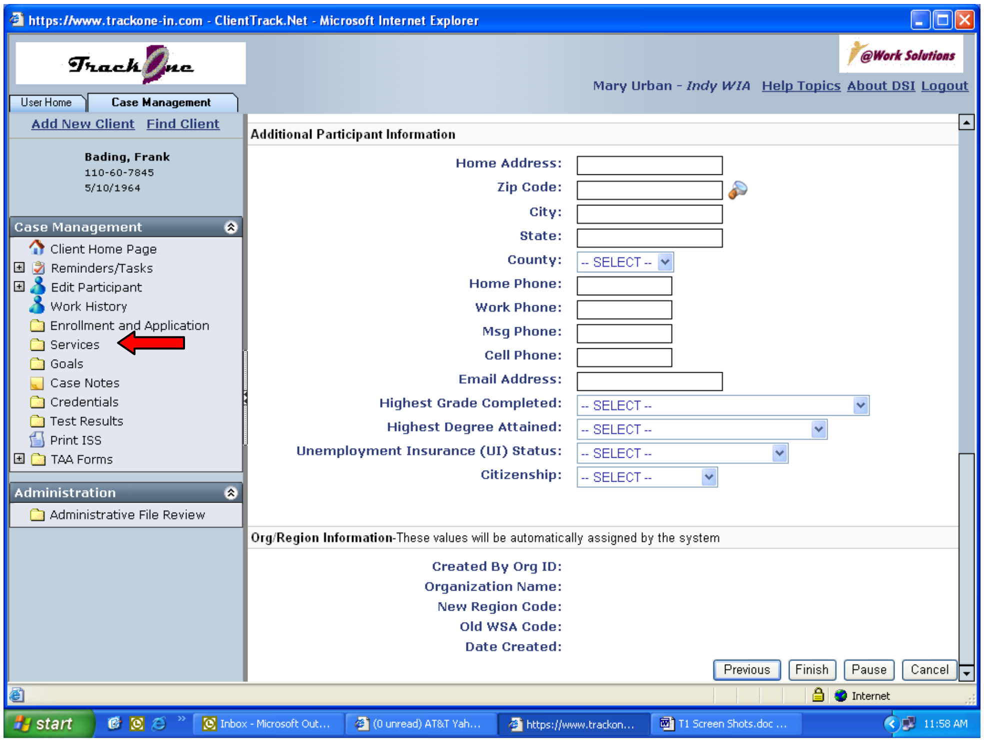
Step 3: This will take you to the "Track One Registration Screen" shown below. You will enroll all customers in the WIA Adult and Wagner Peyser adult funding stream. Click "Save" at the bottom of screen.



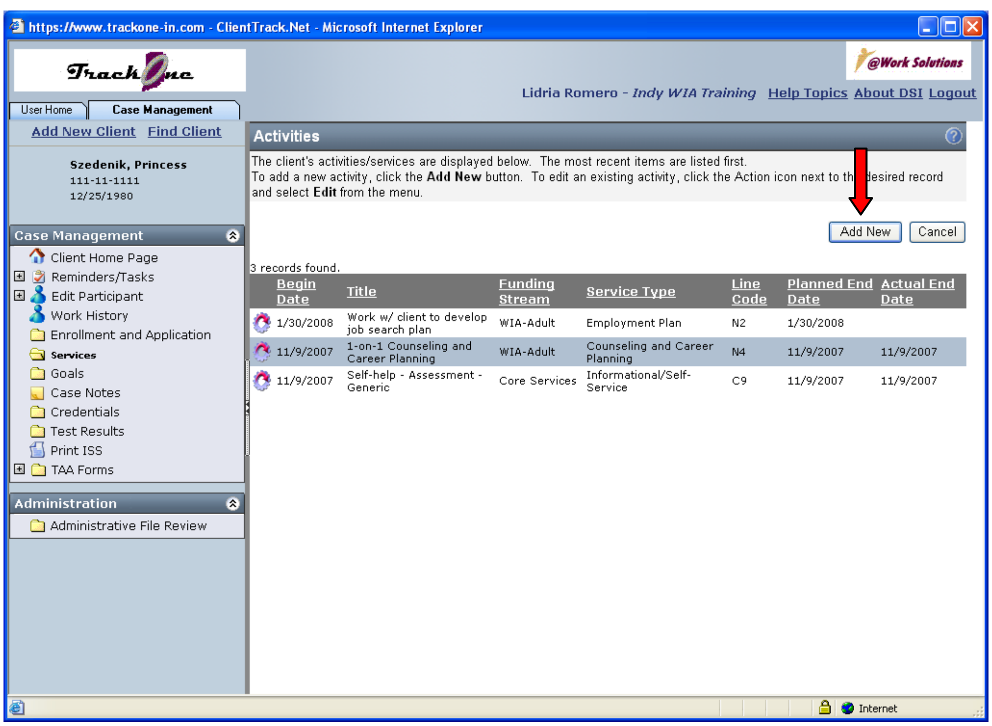
Step 4: Customer will be attached to a Team (*TrackOne capability pending)

H. Record Initial Service

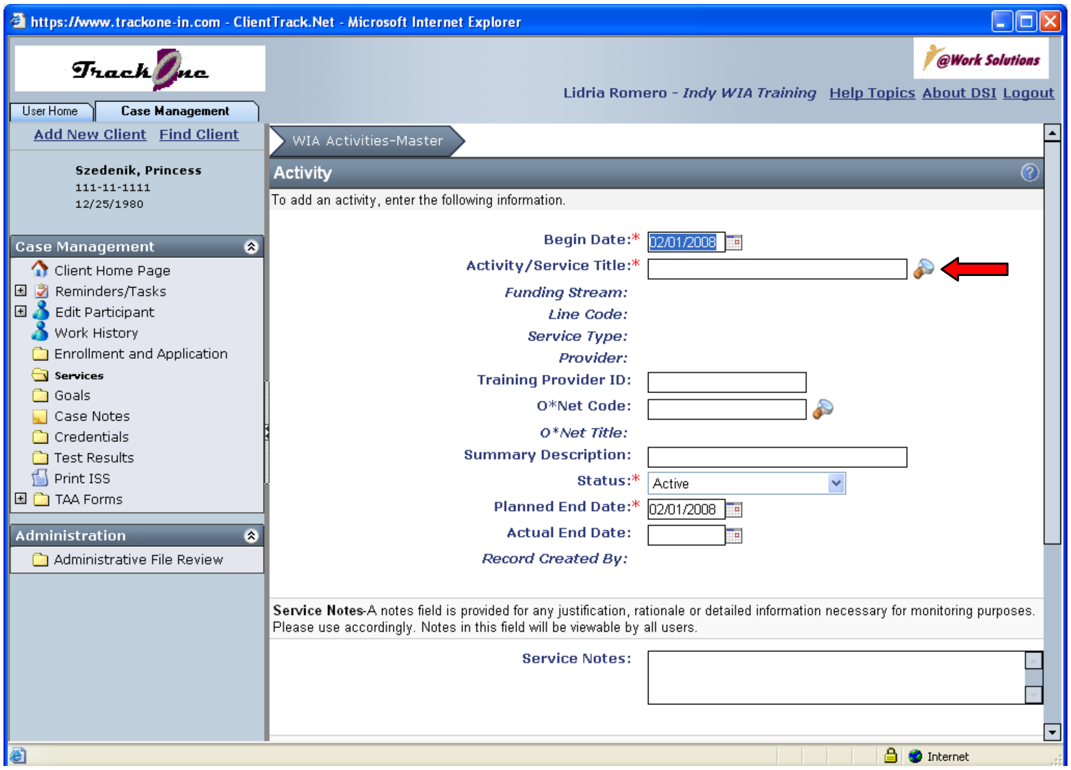
Step 1: Click "Services" on left side of screen this will then take you to "Activities" Screen.



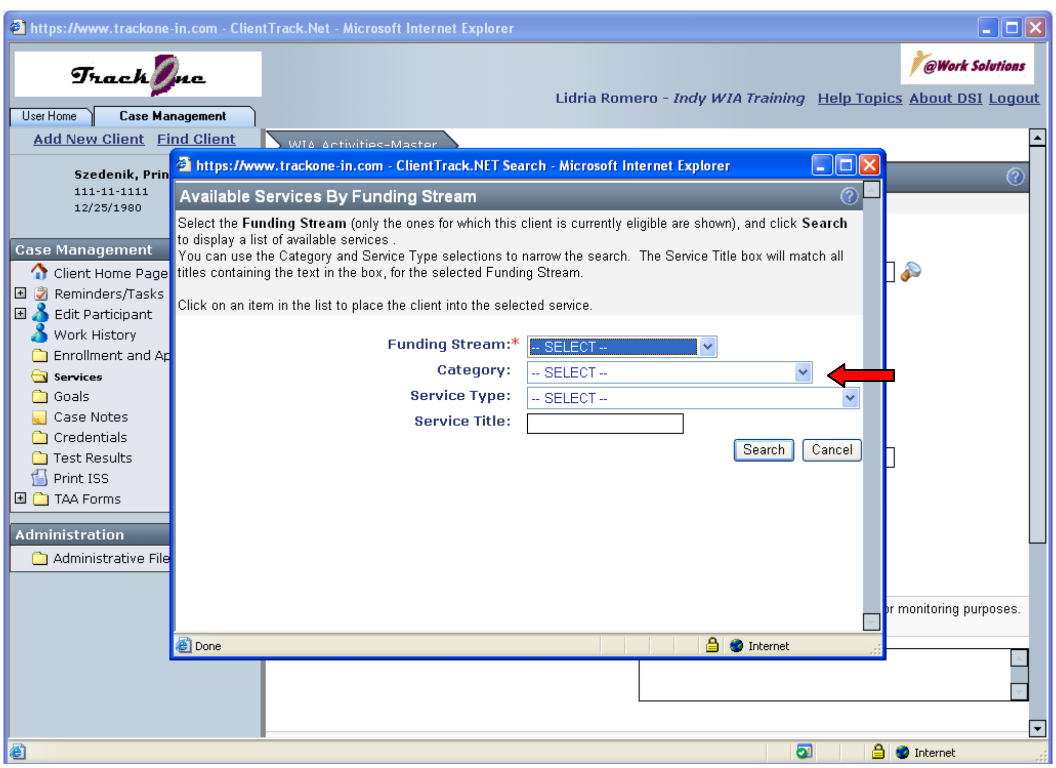
Step 2: Click the "Add New" button. This will take you to "Activity" Screen.



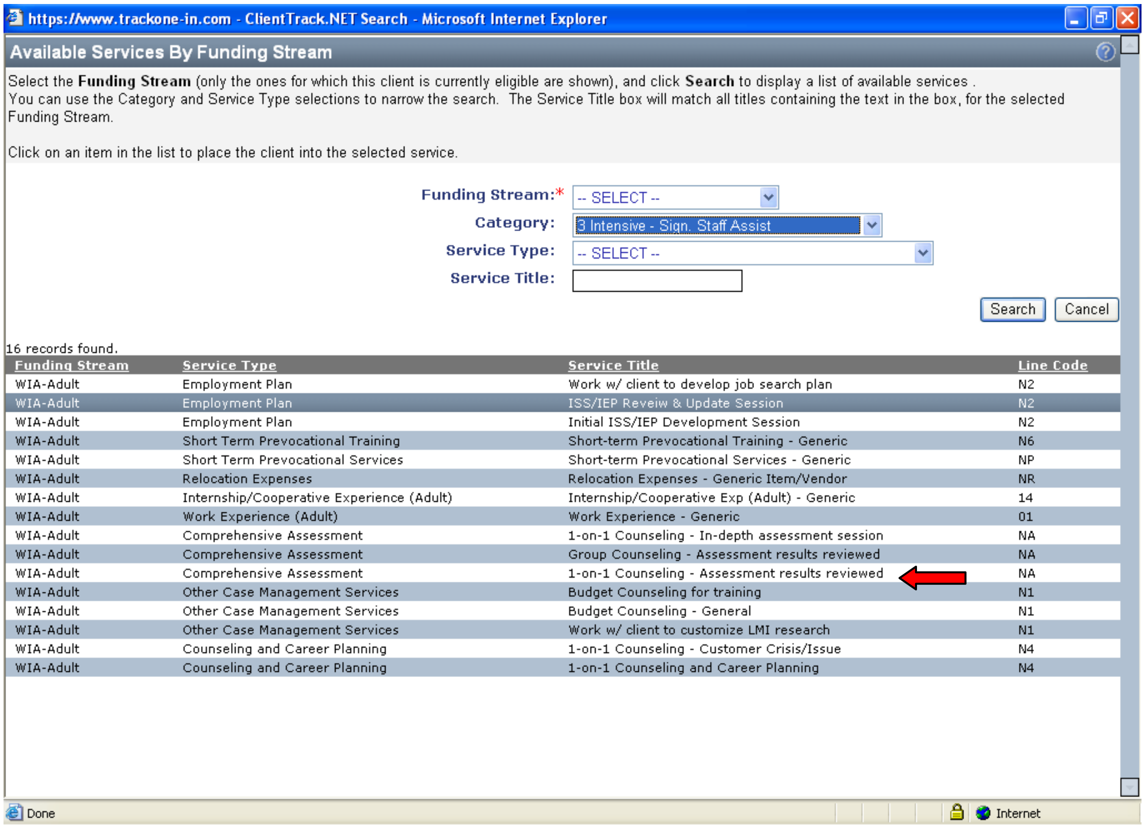
Step 3: Click the magnifying glass next to Activity/Service Title, this will take you to available service by funding stream.



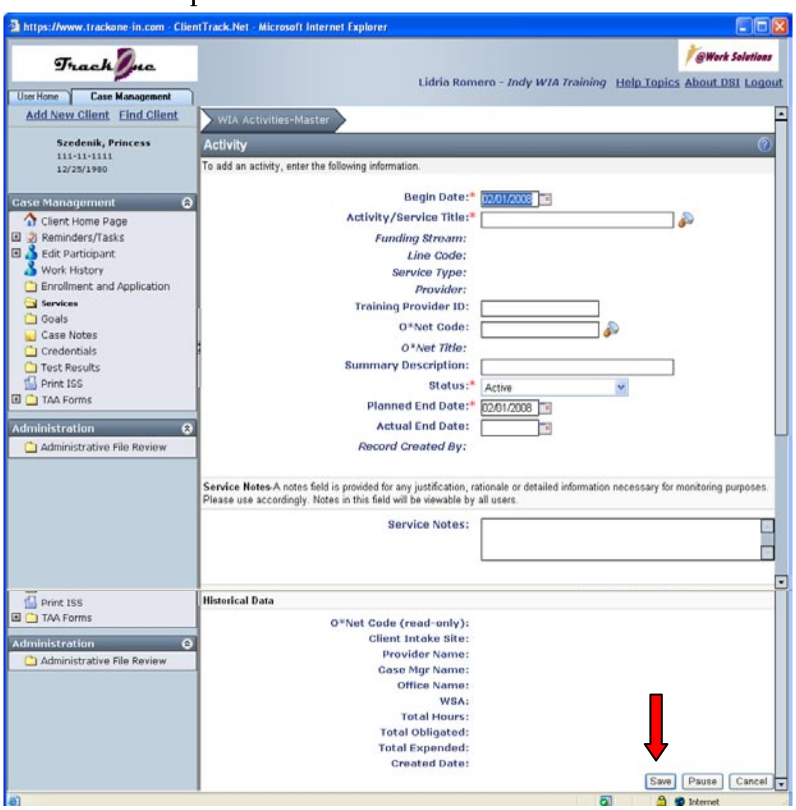
Step 4: Click drop-down menu for "Category" and select "3 Intensive-Significant Staff Assist." Click "Search".



Step 5: This will then give you a list of intensive services to choose from. Select : 1-on-1 Career Counseling- Assessment Results Reviewed.”

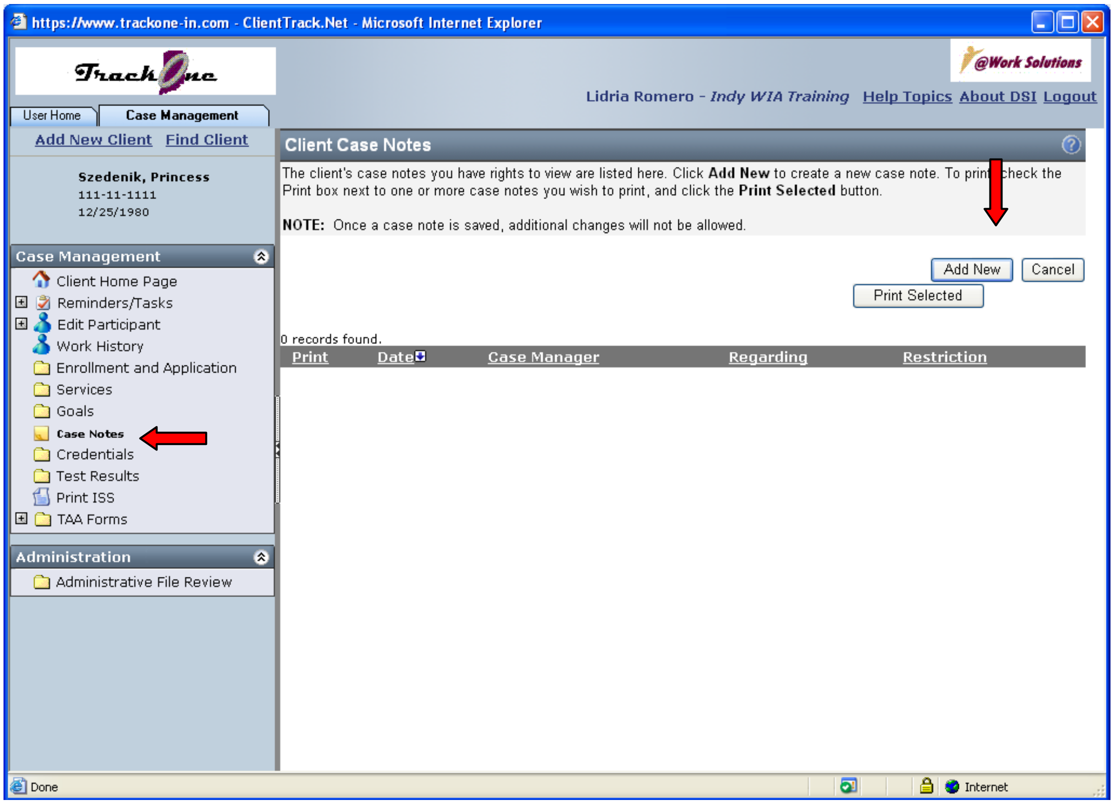


Step 6: Once you select “1-on-1 Career Counseling”, you will go to the activity screen. You must complete all asterisk and then click “Save” button on bottom of page.



I. Record Initial Service Case Note in Track One

<u>Step 1:</u> Click "Case Note" folder on left. This will take you to the "Client Case Note" screen shown below. Click "Add New" complete all asterisks at top.



<u>Step 2:</u> Enter your case note. The case note will need to include, at a minimum, the information listed in the example. Example: **Met with customer (or name of customer) and administered the initial skills indicator assessment to determine basic skills in language and math. Based on results and discussion, services beyond Core are needed to obtain/retain self-sufficiency employment. I am referring them to Career/Skills Team.**

Click "Save" button.